

Village Blueprint

Building a Community For All Ages



Authored by Leslie Marks, in collaboration with the Bethesda-Chevy Chase Regional Services Center, Montgomery County, and Family & Nursing Care

Village Blueprint

Building a Community for All Ages

Authored by Leslie Marks, in collaboration with the
Bethesda-Chevy Chase Regional Services Center

Revised 9/24/10

Contents

Welcome	4
Acknowledgements from Leslie Marks, Blueprint Author	5
Executive Summary	6
Getting Started	9
Early Work	14
Developing a Working Model	18
Building A Village Budget	29
Getting the Message Out	33
Managing Your Village	39
The Care and Feeding of Volunteers	45
About the Author	53
About the Bethesda-Chevy Chase Regional Services Center	54

Welcome

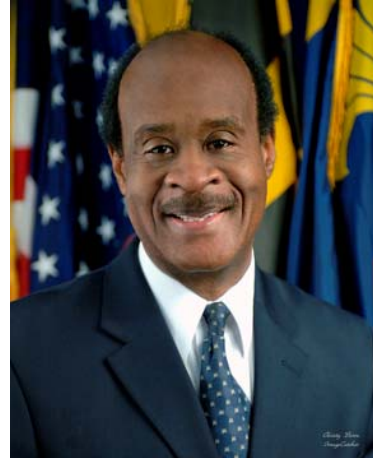


Dear Community Leader:

Thank you for your interest in building a Village in your neighborhood. You are at the forefront of local and national efforts to provide local services that address the changing demographics of our community. Since the first day of my administration, I have made it clear that my vision and priorities include vital living for all our residents and particularly seniors.

It is clear to me that Villages provide critical neighbor-to-neighbor connections to combat social isolation, improve mobility and access to services, and provide knowledge and support necessary to empower residents to be healthy and secure.

Participants of my 2009 Senior Summit identified the need to encourage and support the creation of Villages in Montgomery County neighborhoods. The Village movement in Montgomery County has already begun. Neighbors in Bannockburn, Chevy Chase, Burning Tree, Cabin John, and Somerset have come together to create Villages and communities that serve their residents. These Villages in turn are inspiring many other communities to begin work on their own efforts.



Since 2007, my administration has been actively engaged with these communities – exploring partnerships, providing advice and technical assistance, providing training, and creating opportunities for the sharing of ideas. The Office of Community Partnerships, Department of Health and Human Services, and Regional Services Centers are to be commended for their work with emerging Villages. We are also looking at these communities and others nationwide as models for community-based senior services that can be applied in all parts of the County.

Your efforts help build a County that ensures the vital living of all of our residents. This Village Blueprint provides guidance, examples, and links to resources that will help make your vision for your community and others yet to be created a reality. I congratulate Leslie Marks and the staff at the Bethesda-Chevy Chase Regional Services Center for creating a resource which I know you and others in our County will find helpful.

Sincerely,

Isiah Leggett
County Executive

Acknowledgements from Leslie Marks, Blueprint Author

It has been quite a journey from the time I agreed to take on the task of writing a “how to start a Village” document to the final completion almost a year later. I met a lot of wonderful and helpful people along the way and I learned so much about Villages and the opportunities and challenges of making them work. Coming from the building industry, I am very familiar with building new Villages and I was intrigued about how to successfully build a Village program in an existing neighborhood.

No project of this size or magnitude gets done without a lot of help from many different sources. I would like to thank the many friends, colleagues and associates who helped me out along the way.

First of all, I would like to thank the founders of Beacon Hill Village for their vision and entrepreneurial spirit. Their hard work and imagination helped start a nationwide movement not lost on the communities of Montgomery County.

Harry Rosenberg and Leslie Kessler were tremendous sources of information and support. They formed the first Village in Montgomery County and we have all benefited from their hard work and attention to detail. Leslie and Harry provided me tremendous amount of information, documentation and support throughout this project.

I received a great deal of useful material about volunteer management from Senior Connections and I want to thank Sue Dollins, Executive Director for sharing this information.

I’d like to thank Andy Mollison from Palisades Village. Andy was ready to listen to my questions and offer the benefit of his experience with the creation of Palisades Village. Andy willingly offered examples of documents created by Palisades Village.

When I needed information about volunteer management, specifically, a job description for volunteers, Barbara Hammock provided the information I needed. I used information Barbara provided in a training session on volunteer management she conducted for Montgomery County Villages.

The most complicated part of Village formation, for those Villages that want to create a nonprofit entity is the Federal and State process required to do so. I prevailed upon Julian H. Spirer, Esq., Spirer Law Firm, P.C., to provide me with guidelines about how to get started with the process of creating a 501(c)3 nonprofit entity.

The section on Red Flags; Observations and Opportunities was provided by The Mental Health Association of Maryland.

Thank you to everyone who helped this project become a reality. I also want thank Ken Hartman, the Director of the B-CC Government Center who encouraged me to take the job and supported my efforts along the way.

For those of you who are reading this Blueprint, I hope you find it useful and that your journey developing your community Village is a rewarding and successful.

Executive Summary

Villages are a national movement that started in Beacon Hill, Massachusetts. A Village is a grass roots organization created for the purpose of providing older adults lifestyle choices that include their desire to continue to live in their own homes with independence and dignity. Montgomery County created the “Village Blueprint” to support communities within the county that desire to start a Village organization in their neighborhood. The Blueprint is a step-by-step guide for organizers about the process of initiating and developing a Village in their community.

The Village Blueprint is divided into seven (7) “how to” sections and five (5) sections of sample forms and additional resources available locally or on the web to assist Village organizers achieve their goals. While each Village will have it’s own distinct personality and priorities, there is an organizing formula that all groups should follow to successfully launch a new Village.

The first chapter of the Blueprint discusses getting started. In this chapter you will get information about initial steps that an organizing group needs to consider in order begin the process of organizing a new Village. The Blueprint provides contact sources within Montgomery County Government that can assist your group in the conceptual process.

Chapter two discusses the homework that the organizing group needs to do and questions that need to be answered in order to move forward with your Village. One of the most important steps to be taken is a needs assessment to determine the interests and needs within your community. Again, resource information is provided to assist with such things and developing and analyzing the needs assessment.

The next step in the development of your Village is creating a working model. In this chapter the pros and cons of creating an all-volunteer community or going with a paid staff model are outlined. Establishing community priorities are discussed with

examples of services your group may want to offer in your Village. Structural questions are discussed such as, budgets, initial funding sources, creating a 501(c)3, and liability insurance. The organizational structure of your Village and the steps that need to be taken by your group is part of this chapter.

There is one chapter reserved for the Village budget, how to build one and the scope of services it may cover. In this chapter membership fees are addressed.

Marketing the Village to the neighbors in your Village community is an important element to the success of the Village start up. In this chapter there is discussion of how to reach out to neighbors and how to sell the Village vision that your initial organizing group developed. There are ideas about how to create a marketing plan and different marketing ideas and opportunities. You will find an outline of how to prepare for your first community meeting. The community meeting to announce the formation of a community Village requires planning and forethought to be successful. There are also county resources that can be drawn on to help you with the marketing of your Village to residents.

There is a chapter on the management of the community Village. Again, you will find a discussion of the pros and cons of paid staff versus an all volunteer management model. The chapter addresses the necessity for standardized forms, job descriptions for volunteers, and assessment and record keeping forms. A brief discussion of strategic planning, a process that is helpful to getting all leadership on the same track and creating priorities and a roadmap of action for a period of 2 – 5 years is available. After a strategic plan is adopted, it is important for the group to monitor the plan and measure progress against the plan.

The volunteer section of the Blueprint is an in-depth look at recruiting volunteers, keeping volunteers engaged, training volunteers, and evaluating volunteer service. The chapter provides a listing of suggested volunteer activities that your Village may use in creating its own program. There are resources identified for training volunteers. Each volunteer should sign a confidentiality statement to protect recipients of volunteer

services. The issue of insuring volunteer activities from liability is also discussed. Volunteer management software is listed in this section.

We hope you find this Blueprint a useful tool in your process of creating and launching the lifestyle option of Village living in your community.

1 Getting Started

AARP has characterized the huge expansion of the Village movement as not so much an aging issue but a living issue. Far from being a cookie cutter program, Villages customize, personalize and humanize a living environment and lifestyle. The Village movement captures peoples' interest in staying in their own home and has the benefit of creating a greater, deeper, and stronger sense of community.

Early Leadership

Every new organization needs a vision and a dedicated core of individuals ready and willing to make that vision a reality. Identifying a core group of individuals in your community that share the vision of creating a Village within the community is a top priority.

Keep in mind as your group gets started that you are setting the tone and direction for your Village. Consider starting small and building on your successes. Establish an ability of the leadership and Village volunteers to deliver on their promises. You can always add programming as you find a need and demand.

Identifying a core group of individuals in your community that share the vision of is a top priority.

The embryo of a new village often starts with a group of neighbors at an informal gathering discussing the issues facing them as they confront the realization of aging and the challenges of staying in their own home. This group often re-enforces individual desires to continue to live in the same home in the same neighborhood and a need to figure out how to accomplish that goal.

This is not a one person job. Whether your effort begins as neighbors talking informally or one individual who has articulated the vision, a working group needs to be established. Early organizational meetings deal with a wide range of issues, group organization, group leadership and defining and assigning leadership roles. Your early

leadership team should be willing to commit the time and energy to the creation of your village for approximately 3 – 5 years.

Here are some qualities that you should look for as you create your leadership team.

Intelligent risk takers: You are starting something new in your community and you need a team of leaders who enjoy working on new ventures and exhibit an entrepreneurial willingness to experiment.

Respect and contacts: The leadership will need to approach organizations, community groups and members of the community to ask for help, money, and support. Knowing a wide range of people within the community is helpful, being a respected member of the community is essential.

Nonprofit and/or professional expertise: It is very helpful to have members of your leadership team who represent some of the following areas of expertise:

- Financial/accounting
- Legal
- Fundraising
- Management experience in other non profit organizations
- Experience managing volunteers
- Experience with aging and the elderly

Strategic Partners: Consider creating an advisory committee of strategic partners that are interested in supporting your village. Your strategic partners do not necessarily need to be members of your village; just interested parties of helping your village become successful.

Residence: The leadership should come from the community itself. There may be exceptions to this rule if the community enters into a partnership with an organization

such as a local hospital, that organization may have representation on the leadership team.

Financial Means: Early leadership members sometimes may need to provide initial financial support either by their own contributions or by soliciting contributions from others. This is not a critical characteristic but a helpful one. Even all-volunteer Villages need financial support to sustain operations.

Community Representation: Ideally, the leadership should represent age, gender, class, and ethnicity of the community. Often, the leadership will be self-selected individuals who want to start a village. Leadership diversity should be a goal and achieved to the level possible.

Early in the organizational period an interim leader should be selected from your leadership team. One of the first discussions the leadership team should have is defining the roles of the team as a whole and the tasks that need to be addressed in order to push the creation of an operating Village forward. Each team member must accept the responsibility of at least one of the identifiable tasks. A group leader needs to be identified early - this person takes on the responsibility of coordinating the group efforts and moving the group forward toward achieving its goals.

Resources

Montgomery County Government offers a variety of resources helpful to community groups exploring creating Villages in their neighborhoods. As you begin the process of creating a new Village, take time to explore the resources available to you. The following are a list of County resources that should be explored:

- **The Bethesda Chevy Chase Regional Services Center (BCCRSC):** Neighborhood Support Networks - Villages Resource Exchange. Any of the County's Regional Services Centers are excellent places to gather information and explore partnerships. BCCRSC offers professional consultation at no fee in helping your core group start a new Village. The staff at BCCRSC can put you in touch with other Villages groups in the County. They offer networking sessions for existing Villages and those

involved in starting new Villages. BCCRSC provides embryo Villages connections to a wide range of county and non-profit services.

www.montgomerycountymd.gov/bcc

Phone: 240-777-8200

- **Senior Connection:** Assistance in training, umbrella liability insurance, and transportation.

email: seniorconnectionmc@gmail.com

phone: 301-962-0820

- **Montgomery County Commission on Aging:** Provides assistance in fielding a community survey. The survey (which we will talk about in more detail in Chapter 2) is essential in determining a scope of services your “village” will support.

contact: Odile Saddi, Executive Director,

Odile.Saddi@montgomerycountymd.gov

- **Montgomery County Aging & Disabilities Services:** Support in analyzing community survey responses.

contact: Charles Smith, Aging & Disability Services

Charles.Smith@montgomerycountymd.gov

phone: 240-777-3000

- **Montgomery County Volunteer Center:** Can help identify pro bono consulting in a variety of areas, such as, financial, legal, volunteer training, and computer training.

www.montgomerycountymd.gov/volunteer

email: volunteer@montgomerycountymd.gov

phone: 240-777-2600

- **Montgomery County Information and Resources**

www.montgomerycountymd.gov/senior

phone: 240-777-3000

- **Office of Community Partnerships**

contact: Austin Heyman, 240-777-2570

Austin.Heyman@montgomerycountymd.gov

- **Legal Aid**

Legal Aid Bureau, Inc.-Citizens Program

www.mdlab.org

phone: 410-539-5340

Pro Bono Legal Advice Clinic

www.montbar.org

phone: 301-565-7675

- **Maryland Association of Nonprofits**

www.marylandassociationofnonprofits.com

Silver Spring Office: 8720 Georgia Ave., Ste. 303

Phone: 877-565-0707

- **Village to Village Network:** a national organization that supports the Village movement. This is a membership organization with a wide variety of support available to members.

www.vtvnetwork.org

See Appendix C for additional resources.

2 Early Work

Doing Your Homework

Once a core group of leaders is in place, the next big step is doing your homework. There are many Villages within Montgomery County as well as throughout the county that can provide invaluable information. Some Villages have written detailed documents outlining their start up process as well as lessons learned from their experiences. There is a great deal of information about Villages on the web that should be explored. Meeting with other Village organizers is often very enlightening and should be put on your “to do” list. The BCCRSC can provide you with a list of Montgomery County Villages.

Identifying Geographical Boundaries

Knowing your community is an essential part of your early work. You can retrieve census data about your community from the Maryland National Capital Park & Planning Commission (MNCPPC). MNCPPC has analyses of aging trends within the county as well

Keep your goals flexible enough to change as the needs of your membership changes.

as within your community. MNCPPC data includes the age, sex and income of the residents in your community; number of households; and household size. Understanding the profile of your neighborhood will help your leadership decide if there is a sufficient core group of the appropriate age to warrant moving ahead. The data will also provide an insight into the general economic circumstances of residents.

Your community probably has a subdivision name and boundary delineation on record at MNCPPC. The recorded subdivision can be used as the geographic definition for the community service area. One of the leadership’s decisions is to identify the physical geographic boundaries for the

Village. Regional Services Centers have MNCPPC maps on hand that identify neighborhood boundaries.

Finding a Home

It is helpful, though not essential, to find a place that your Village can call home. A community clubhouse with meeting space is ideal. For communities with no internal community meeting space, you may find a local church or synagogue that will be willing to host your Village meetings. Other meeting options are: local libraries, local businesses or banks with conference rooms or meeting spaces, or perhaps local government buildings such as the Regional Services Centers and of course members' homes.

Developing a Mission Statement

Developing a mission for your village is one of the most important tasks your leadership group must undertake and can be the most difficult task for the group. Defining a mission is a statement of purpose for your Village.

The mission statement offers the vision for establishing a community Village, who you hope to serve, and how. An example of a mission statement is:

“The purpose of Friendly Village is to support the lifestyle needs of the residents of the Village in order to allow residents the choice of continuing to live in their current home and community while sustaining an acceptable quality of life.”

Identifying a Target Audience

Making a decision about the profile of the group your Village intends to serve will influence your programming and goals. There are several options for your leadership and community to consider. Your Village can choose to be intergenerational and include all neighbors living in your targeted neighborhood. Or, as many communities decide, the target audience you wish to serve may be a senior audience. If you decide that your Village mission is to serve a senior audience you must define senior either by age, ability or both. Deciding on your target audience will affect everything else you do.

Goals

Along with creating a mission and targeting your audience, the leadership group must create goals for the Village. Goals should be specific, measurable, realistic, tangible, and most importantly, achievable. Something to keep in mind - keep your goals flexible enough to change as the needs of your membership changes.

Goals should
be specific,
measurable,
realistic,
tangible, and
most
importantly,
achievable.

Examples of Village goals are:

- To make the routine of daily life accessible to all residents by having a means of transportation available.
- To assist residents maintain acceptable nutritional levels.
- To provide opportunities for residents to have social contacts and meaningful interaction with neighbors.
- To provide tools for improving personal and neighborhood security.
- To assist residents with chores of daily living on an as needed basis.
- To provide a neighborhood check on the well being of Village residents.
- Provide a list of reliable contractors for home improvement needs.
- Enhance quality of life and vital living experiences.

The Needs Assessment

A needs assessment is important to determine the interest of your community residents in being a part of a Village program. A needs assessment will determine the interests of the community residents in terms of programs they would like to see implemented. The needs assessment will assist the leadership to establish a scope of services to offer residents. Understanding the depth and scope of preferred services will

impact budgeting, neighborhood volunteerism, outside community resource support, strategic partnerships, and scope of government assistance.

The County's Regional Services Centers and Department of Health and Human Services can advise your group in developing the neighborhood assessment document. They can also provide assistance in having the returned assessments analyzed. It will be up to the leadership group to promote and publicize the needs assessment, to alert residents to expect to receive the assessment and to explain to residents the importance of completing the assessment and returning it. It is important to get a strong response to the needs assessment and this may be the first test of leadership's skills and commitment to getting the job done.

See Addendum A for a sample survey.

3 Developing a Working Model

A major decision your leadership group must address is the operational model for your Village. Will you best accomplish your goals by operating your Village on a strictly volunteer model or will your Village program function best using paid staff in some format. If you decide on an all-volunteer model, you will need strong and committed leadership and an organized and committed group of volunteers. There needs to be a clear chain of command for volunteers and ultimately someone has to be in charge.

Paid Staff or Volunteers

If you decide that paid staff is the model for your Village, then the decision needs to be made about the function and responsibilities of the staff. After that decision is made you will be in a position to decide how much staff time will be necessary to accomplish the outlined responsibilities. There are pros and cons to each decision, paid staff versus an all-volunteer organization - both have been tried. Therefore an initial decision about whether to have paid staff is necessary to proceed with the creation of a business plan.

You are not locked
into initial staffing
decisions.
Consider starting
as a volunteer
group and grow
into paid staff.

Paid Staff

Pros ----- Cons

- An accountable person(s) whose sole responsibility is to pursue the program objectives of the "village."
- The opportunity for a greater scope of programming offerings
- Timely evaluations of programmatic successes, needed program adjustments, program elimination
- Timely responses to members needs - Someone is always on the job and accountable
- Everyone knows who is responsible
- A greater ability to research programs and implementation of programs
- Someone to organize and manage volunteers
- The necessity for a larger budget to support paying staff. You should plan on paying between \$45,000 - \$80,000 for paid staff in addition to benefits.
- Likely to charge higher membership fees to support staff
- Need to assess if higher fees are sustainable
- Coordination between paid staff goals and Village members goals
- Managing the staff
- The potential need for paid office space and office equipment such as computers, desks, chairs, lamps, phones, etc.

Qualifications for paid staff should include non profit experience; healthcare or social work experience; and development or fundraising experience.

Volunteer Organizations

Pros ----- Cons

- | | |
|--|--|
| <ul style="list-style-type: none">○ Lower membership dues and costs to residents who want to participate.○ Can create a greater sense of community. Village members directly supporting and helping their neighbors and fellow village members.○ Initially minimize organization's financial liability at startup.○ Gets people in the Village involved○ Substantially less expensive with less impact on operating budget○ Maintains a direct connection to needs of Village residents○ Neighbors may be easier to approach than paid staff | <ul style="list-style-type: none">○ The need for detailed organizational structure and specific job assignments and responsibilities○ Volunteers don't always feel the same commitment and urgency to get the job done as paid staff○ The sustainability of an all-volunteer Village program○ Do volunteers have the credentials and experience to provide needed services?○ The need for someone to be in charge and responsible○ Who will manage and train volunteers○ Potential confidentiality issues○ Insurance and liability issues |
|--|--|

See page 39 for additional discussion on managing your village.

Implementing the Vision

You are ready for the next steps in the creation of your neighborhood once you have successfully achieved the following:

- Assembled your leadership team
- Decided on a community name
- Identified community boundaries
- Created an initial mission statement
- Identified a target audience eligible for membership
- Decided whether your village will operate as an all volunteer model or a paid staff model
- Agreed to your Village goals

- Sent out and received back the community survey

After you have carefully analyzed the results of the community survey you should have a good idea of the scope of services residents are interested in receiving. The results of the community survey will give the Village leadership the criteria for establishing a menu of services they propose the Village provide resident members. Existing Villages have found that the most sought after services are social events, transportation to appointments, and handyman services such as changing light bulbs.

The following is a sample list of services that might be offered as a result of citizen interest. You might consider bundling services into packages and offering packages of services for a set fee. Bundling services is one way to reduce costs if you are charging members for services.

- **Transportation to appointments** such as doctors, beauty parlor, cultural events, or meetings
- **Coordination and dissemination of county services** available to support seniors living in their own homes
- **Help with grocery shopping** either providing rides or doing the shopping for a resident who can't shop for themselves
- **Help for sight impaired residents**, i.e., balancing checkbooks, writing checks
- **Access to reliable contractors** for home repair and routine home maintenance services, such as, changing light bulbs, shoveling snow from walks, unplugging drain backups. Consumer Checkbook is a service that rates contractors. You can outsource referral sources, a free service to members; contractors pay to be included on a list. Referral services also screen vendors.
- **Social programs** such as wine & cheese, potluck dinners, coffees, book reviews. Social programming is very important in creating community

and developing trust between village members. It is easier for a village member to ask for help from a volunteer if he/she knows that volunteer.

- **Educational programs** on topics such as health & wellness, financial planning, current events
- **Security watch**
- **Junk Collection**

Partnerships

As you develop your business or organizational model, consider partnerships with existing local non-profits as you consider how to implement services. Burning Tree Village has a partnership with Senior Connection for transportation services to its residents. Senior Connection takes phone calls for transportation services and coordinates volunteers.

Other non-profits, such as Top Banana Home Delivered Groceries can shop for groceries and help residents put them away for a nominal fee.

Initial Funding

Your business or operational model also needs to address basic issues such as finding seed money and deciding on an initial fee structure. Looking for seed money is most practically done after a draft first year operation budget has been prepared. The budget will provide an indication of the amount of seed money that will be required. Potential sources of funding may include applying for grants from the County or from non profit foundations and finding community partners that are willing to put up seed money including congregations, local hospitals, and businesses; and contributions from your leadership group. Some Villages have been successful in obtaining Americorps dollars to fund an executive director.

As you decide on an initial fee structure, it is important to do an analysis of fee structure versus services offered as one determinant of program value.

Creating a 501(c)3

Another major step to be considered in creating a viable Village is whether the group wants to create a 501(c)3 non-profit entity. A key reason communities choose to establish a 501(c) 3 is to create a foundation for raising money for a community project, such as a Village, or charitable activity such as establishing a foundation. By obtaining a 501(c)3 status you will be in a position to seek and receive government grants as well as grants from other foundations. The non-profit status is an incentive for potential partners to contribute time and/or funds to help create and sustain your village.

Pros and cons of creating a 501(c)3 non-profit status

Pros/Benefits	Cons/Restrictions
Tax exemption - state and federal exemptions from corporate income taxes plus certain other taxes. A tax-exempt nonprofit will also save on local taxes such as levied by your state, and county.	Lots of paperwork- you will be required to establish and maintain a list of necessary documents and records
Ability To Receive Public And Private Donations - Eligible for Government and Foundation grants	Costs such as hiring a lawyer to prepare your papers
Incorporation/Protection from Personal Liability - formal structure ensures that the mission, goals, and structure of the nonprofit come before the personal interests of individuals associated with it. Board members, officers, and employees of your organization will be protected from liability for corporate debts or liabilities such as unpaid organizational debts or lawsuits against the organization. Creditors can go after only your corporate assets, not the personal assets of the people who manage, work for, or volunteer for your organization.	Costs (Time and energy to comply with regulatory demands and to grow your organization)
Eligible for lower postal rates on third-class bulk mailing	No political campaigning or lobbying
Eligibility for cheaper advertising rates	If your organization folds, its assets must be given to another nonprofit
The ability to air free radio and television public service announcements (PSAs)	Lack of privacy (finances, salaries, filings are all public)
Possibility of lower retail rates	
Individual donors to your nonprofit corporation can claim personal federal income tax deductions for their donations	

The following is a description of the process necessary to achieve 501(c)3 status. While it is possible to navigate the process without legal assistance, it is probably helpful to have legal support. If you don't have access to legal support within your community, there are pro bono legal options. Online resources for 501(c) 3 requirements and forms may be found at: <http://www.irs.gov/charities/charitable/article/0,,id=96099,00.html>

Assuming that your village has already become incorporated, the necessary federal form to be completed and filed is the Form 1023. This further assumes that the organization is to be exempt under section 501(c)(3) of the Internal Revenue Code as a charity. (If the organization will not be performing charitable work but will be functioning simply as a community assistance group, then it may not be eligible for exemption under this section of the Code but rather under section 501(c)(4). In such an event, it should file Form 1024.) Forms 1023 and 1024, and additional information about the exemption application process, should be accessible through www.irs.gov/charities.

While it is possible to navigate the process without legal assistance, it is probably helpful to have legal support.

To obtain Maryland income tax exemption, a letter of request is required. The letter should be addressed to Comptroller of Maryland, Revenue Administration Division, 110 Carroll Street, Annapolis, MD 21411, to the attention of the Legal Department.

The letter should be accompanied by a description of the organization's nature, purpose, and scope and a copy of the organization's bylaws, financial statements, and an IRS determination letter confirming the organization's federal tax exemption as a charity. Both charities and exempt community services organizations are eligible for Maryland income tax exemption.

To obtain exemption from Maryland sales and use taxes, the organization must complete and file a Maryland Combined Registration Application available at forms.marylandtaxes.com. The Registration Application must be accompanied by the IRS determination letter, the organization's articles of incorporation and bylaws, as well as a Maryland good standing certificate. The latter can be obtained from the Maryland Department of Assessments and Taxation. Instructions to obtain a certificate are available at www.dat.state.md.us. Only charities can be found exempt.

Any organization that will be soliciting funds in Maryland must also register with the Maryland Secretary of State through the completion of a form COR-92

available at www.sos.state.md.us.

To be eligible for 501(c)3 status, your group must serve a “charitable class” - not an individual or a few individuals in a selective group. Examples of a charitable class include seniors, regardless of income and those with disability. It is important that your group document the neighbors you will be assisting and how they fall into a charitable class. You should also include with documents to IRS any newsletters, web sites, amount of people in-group, any waivers for individuals with financial hardships, include pictures.

See page 42 for additional information about 501(c)3 designation

Liability Insurance

The Village leadership should definitely consider liability insurance, particularly if you want to use high school students as volunteers. While minimum liability insurance should be sufficient, consulting with an insurance agent is advised. Villages surveyed indicated that they have \$1 million liability insurance and \$1 million directors and officers insurance. Comprehensive general insurance costs in the range of \$2,000 a year. ***See Appendix C for insurance companies specializing in nonprofit insurance.***

The Federal Volunteer Protection Act has extensive coverage for any tort claim against volunteers. In Maryland there is no tort liability for personal injury for volunteers.

Creating a Budget

Creating an operating budget is another essential part of creating an operational Village. The budget must cover the entire operation of the Village for a 12 month period. The leadership needs to decide on the beginning of the Village operational year and the end of the year. The budget needs to identify sources of income, from dues, from grants, from partnership contributions. The budget must also identify the costs to run the Village programs. For an all-volunteer organization, the following costs should be considered:

Marketing/communication costs

- Website costs
- Postage
- Newsletter printing

Meeting/social program costs

- Meeting place rentals
- Refreshments for meetings
- Speaker fees
- Misc. program costs

Supplies**Member services**

- Grocery delivery
- Ride subsidy (for use on cabs or other forms of transportation)

Other Costs

- Audit/Annual Financial Review
- Legal assistance
- Taxes
- Permits
- Liability Insurance
- Contingency

Budget considerations for a paid staff operation will include all of the above expenses plus consideration for the following:

Payroll (this will depend on the number of staff and the hours per week the staff provides)

Office equipment

Office supplies

Rent & utilities

Copying

Telephone

Repair & maintenance

See page 29 for more information about building a budget.

Organization

Your core leadership team cannot and should not do everything. Consider establishing organizational committees whether you decide on an all-volunteer organization or not. Examples of organizational committees are:

Executive Committee: This is your leadership group; they are responsible for policy, budgeting of income & expense, and committee oversight.

Finance and Budget Committee: Responsible for creating annual budget, this committee can also assume the responsibility of fundraising to obtain additional funds

necessary to operate the Village. You may desire to separate the fundraising activities from the budgeting activities that will require an additional committee.

Membership Committee: This committee is responsible for recruiting members, explaining the benefits of membership and maintaining members once they have joined the Village.

Program Committee: Responsible for creating programs of interest to members using the community survey as a guide, this committee should also seek ongoing additional input for new programs of interest to members. The Membership Committee can be responsible for creating a membership form for use at meetings, social gatherings or on the website on newsletters

Volunteer Management Committee: This committee is especially important to an all-volunteer Village. The committee organizes volunteer activity and responsibility. The committee is also responsible for volunteer training; there are volunteer resources available for training. This committee meets regularly with volunteers to address issues, celebrate successes, and make additions or reductions. The committee develops reliable processes for soliciting, vetting and implementing volunteer ideas. This committee is responsible for keeping records of volunteer activities, and obtaining feedback about how well services are being delivered. This committee is responsible for the creation of a volunteer form for a request for service, a request for volunteers to deliver service as well as the volunteer assessment and a recipient assessment of services delivered.

Fundraising or Development Committee: Necessary for both volunteer organization or with paid staff; additional funds will be required to fund your village. Identifying a group whose responsibility it is to apply for grants, approach potential community partners, and donations from Village members.

Nominating Committee: A committee to identify new and existing leaders willing to serve in a leadership capacity.

Meeting Etiquette

To improve the effectiveness of your committee meetings, be sure to follow these tips:

- Follow Robert's Rules of order. For more information about Roberts Rules online, visit: www.robertsrules.org
- Under no circumstances should "undue strictness" be allowed to intimidate members or limit full participation.
- Prepare and post an agenda
- Clearly state the purpose of the meeting on the agenda
- Start and end on time
- Keep the meeting moving and watch the general flow
- Encourage participation
- Summarize the conversation frequently
- Stress cooperation, not conflict
- Summarize decisions reached
- Point out differences not yet resolved

4 Building A Village Budget

Your Village budget is the operating blueprint that outlines your Village's priorities. The budget functions as a road map for the next year and perhaps longer. The size of your budget, the income and expenses the Village incurs depends on several critical decisions that are made about the operation of your Village.

The first decision to affect the budget is whether or not your Village hires staff to support the Village activities or whether your Village becomes an all-volunteer managed organization. Paid staff adds a substantial amount to the Village's expenses; you should plan on a salary between \$45,000 - \$80,000, depending on experience of the individual and the hours they commit to the job.

The budget is
your road map
for the next
year and
perhaps
longer.

Another major effect on the expense side of the budget is the scope of the programming the Village decides to offer. Will the Village offer programs at no cost to Village members or will the programming be presented as a "pay as you go" operation?

Budgeting decisions will depend on the projected income the Village thinks it will receive. Identify where the money will come from. Will your Village go after grants and donations to subsidize the costs of running the Village? Consideration should be given to appointing a development or fundraising committee to identify and solicit funds to subsidize dues. Identify members living in your Village who can afford and are willing to offer donations to help start and fund your Village.

Look for ways to reduce costs, including space donations or donations for refreshments from local grocery. Often businesses located in the area of your Village are willing to donate in services or coupons for services rather than cash. Consider establishing an advisory committee of strategic partners who may not be Village

members but who can and are willing to assist your Village with “in-kind” or actual monetary donations.

Membership Fees

The decision on the amount to charge for membership fees depends whether you have an all volunteer model or use paid staff. A membership fee, should you decide to have one, is based on the size and complexity of your Village program. The ability of

Look for foundation support to provide support to those that can’t afford membership.

your target audience to pay the membership fee is also a consideration. A sample of membership fees from around the country include no membership fee all, a small fee of \$15-30/year to a high of \$1,000/year per household.

See Appendix C for examples of village fees.

Membership fees in the Montgomery County

Burning Tree Village: No membership fee

Bannockburn Neighbors Assisting Neighbors: No membership fee

Examples of membership fees in other parts of the country

Capital Hill Village	DC	\$530/yr/individual
Northwest Neighbors Village	DC	\$500/yr/indiv, \$750/household
DuPont Circle	DC	\$450/yr/indiv, \$600/household
Palisades Village	DC	\$500/yr/indiv/\$750/household
Home Ports Inc.	MD	\$300/yr/household

The following are budget categories you should consider when building your budget.

Income Assumptions

- Number of Current Members (dues)
- % of single members
- % of couple members
- % of free members
- Number of new members projected (dues)

Operating Revenues

- Membership dues/renewals
- New member dues
- Program income
- Interest/Dividend Income
- Total Operating Revenue

Operating Expense

- Payroll (if you have a paid staff)
- Management fee (if you do not have volunteer management)
- Membership services
- Program Expense
- Total Operating Expense

Marketing Expense

- Marketing materials
- Web Site/AOL
- Member solicitation
- Special Events
- Newsletter
- Ads/PR
- Total Marketing Expense

Office Expense

- Office supplies
- Copying
- Telephone
- Rent & Utilities (if you have paid staff)
- Office equipment
- Postage
- Repair & maintenance
- Total Office Expense

Event Expense

- Room rental
- Refreshments
- Speaker fees
- Fundraising
- Professional services
- Board & Staff development

Other Expense

- Audit/Review
- Taxes & Permits
- Insurance
- Board gift fund
- Total Other Expenses

Operating Income (loss)**Contingency****Non-Operating Activity**

- Foundations
- Board
- Large Donors
- Annual fund
- Existing Pledges
- Total Non-Operating Activity

Net Income (Loss)

Sample Financial Statement

Financial Statement

Balance Sheet		
Current Assets	Total Checking/Savings	3,810.00
	Total Current Assets	3,810.00
TOTAL ASSETS		3,810.00
LIABILITIES & EQUITY		
	Equity	
	Net Income	3,810.00
	Total Equity	3,810.00
TOTAL LIABILITIES & EQUITY		3,810.00
Profit and Loss		
Ordinary Income/Expense		
	Income	
	Nonprofit Organization Grants	650.00
	Gifts in Kind - Goods & Service	540.00
	Individual, Business Contributions	4,900.00
	Total Income	6,090.00
	Expense	
	<u>Operations</u>	
	Business Registration Fees	515.00
	Accounting Fees	0.00
	Logo Design	300.00
	Cost of in Kind Copying	540.00
	Computer	0.00
	Parking	4.00
	Postage, Mailing Service	95.00
	Printing and Copying	5.00
	Supplies	415.00
	Telephone, Telecommunications	0.00
	Website Registration	36.00
	<u>Total Operations</u>	1,910.00
	<u>Program Expense</u>	
	Kickoff	370.00
	Seminar & Training	0.00
	Social	0.00
	<u>Total Program Expense</u>	370.00
	Total Expense	2,280.00
Net Income		3,810.00

5 Getting the Message Out

Communication & Marketing

Once you have completed the initial organizational phase and have an established leadership group with assigned responsibilities, your next big step is communicating your plans and ideas with your identified target audience, your potential Village members. You have probably spent close to a year getting organized and are motivated and excited about the boundless opportunities for your new Village. Your next big and important job is to sell your enthusiasm, vision, and excitement to members of your community and potential Village members.

Nothing will
create interest
and sell the
benefit of
membership in
your Village like
personal
contact.

Remember, nothing will create interest and sell the benefit of membership in your Village like personal contact. Telephone trees are effective in getting the message out as well as small block by block teas or coffees to introduce neighbors to the Village idea and the benefits of joining. Some communities have established block captains to personalize messages about the Village to the community.

The Survey – The Earliest Communication

The first big marketing program should be started prior to the dissemination of the community survey. Preparing the community for the survey and emphasizing the importance of each resident's response should be an early goal. Using your community newsletter, promoting the upcoming survey at community meetings, and word of mouth are effective means of alerting your community to the survey arrival and the significance of each resident's response. Even in the earliest communications, you

must promote the benefits of a Village organization and the benefits of a Village to the members of your community.

Preparing the community for the survey and emphasizing the importance of each resident's response should be an early goal. Using your community newsletter, promoting the upcoming survey at community meetings, and word of mouth are effective means of alerting your community to the survey arrival and the significance of each resident's response. Even in the earliest communications, you must promote the benefits of a Village organization and the benefits of a Village to the members of your community.

Community Outreach

Simultaneous with and continuing beyond the survey marketing and promotion, the leadership and committees responsible for marketing and PR need to reach out and deliver your message to local community organizations such as:

- Chambers of Commerce
- Religious Congregations
- Local Hospitals, Clinics and Health Care Professionals
- Local Libraries
- Local Colleges and/or Junior Colleges
- Community Newspapers and Magazines
- County Regional Services Centers

One or a combination of many of these organizations can help deliver your message to shared constituencies. In addition to helping you deliver your message, many of these organizations are potential partners that can help you with grants, pro bono work such as legal, leadership training, book keeping and accounting, and program planning.

Maintaining an ongoing relationship with these community organizations will provide support as well as real or implied endorsement for the creation of your Village.

Marketing Plan

Selling any idea or product requires a thoughtful marketing plan. Ongoing communication with repeated yet updated messages help sell your program.

As you develop your marketing plan consider:

- Regular articles in your local community newsletters
- Start your own Village newsletter to deliver a targeted message
- Articles in professionally published newspapers
- Articles in local church and synagogue newsletters
- Door to door messages
- Informational brochures
- Neighborhood meetings
- A website with contact information

Try to identify a resident with computer technology skills to help create a website for your Village. Other sources of help to create your website are

- Montgomery County Volunteer Center: offers pro bono assistance, volunteer training, and services in a variety of languages.
- Montgomery College
- Local High Schools

Implementation

A neighborhood newsletter is an effective way of delivering your Village message and staying connected to community

Many seniors, regardless of age, don't regard themselves as "old" or in need of assistance.

residents. A regular newsletter creates Village visibility and identity and is a vehicle for getting the word out about Village activities. A cost effective method of delivering the newsletter to residents is to use Village volunteers

An aggressive implementation of your marketing plan will enhance acceptance of your proposed Village. A combination of education and selling will provide community residents with an understanding of the Village concept and the benefits of the program for them. Don't underestimate the value of continuing to emphasize the benefits a Village organization has for community residents.

A word of caution about your marketing efforts - many seniors, regardless of age, don't regard themselves as "old" or in need of assistance. Independence is very important for older adults. When selling the benefits of creating a Village, think about selling a third stage of life that is exciting and trouble-free. Your communications should emphasize messages of fun, convenience, and peace of mind, not dependency.

Preparing for and Holding Your First Community Meeting

After the survey has been evaluated, then another marketing campaign needs to be mounted to promote the initial community meeting to launch the Village. This meeting is your opportunity to sell the vision and proposal to the community as well as obtain suggestions from community members. Three to four weeks of notification through various communications channels is needed to alert community members about the meeting including but not limited to house to house leafleting to promote the benefits of a Village program. All leadership members should be tasked with promoting attendance at the community meeting.

The meeting should be rehearsed and well orchestrated. A history of the early committee work, resources found, research and discovery of other Village operations should be presented by chart and by as much graphic material as possible. You might want to consider having speakers from other Montgomery County Villages, County

Heath and Human Services, or from a Regional Services Center to reinforce your presentation.

Remember as you prepare for your first meeting, you only get one chance to create a good impression – BE PREPARED. Be prepared with a comprehensive presentation that:

- Introduces the leadership team, emphasizing their credentials and contributions
- Outlines the work that the leadership group has done prior to the meeting including: (it is helpful to have some of this information as handouts and as power point presentations)
 - Contacts made
 - Information learned from various sources
 - Mission statement & goals
 - Neighborhood boundaries
 - Village name
- Detail the results of the community survey and the proposed programs as a result of the survey results. The survey results should be a handout to attendees and be part of a power point presentation
- Discussion of leadership proposal for an all volunteer program or a paid staff program with pros and cons for each decision.
- Discussion of next steps. This is an opportunity to draw in more community participation as the organization process moves to another step.
- Open forum: Be prepared to answer tough questions. There may be responses that question the leadership group's decisions. It is important that such questions are addressed professionally. Questions cannot be taken personally by the leadership group. All input should be taken seriously and decisions may have to be re-thought as a result of community input.

Communications and Marketing are Ongoing

Marketing is a tool to both educate and encourage potential users about services available to them and for users to take advantage of the services offered. It is important to keep the Village message before the community. Ongoing articles, community meetings, reaching out to community partners, and word of mouth marketing help with your ultimate goal of getting buy in from community members. Your leadership group will need to constantly market the message to potential members in order to keep your membership growing. Remember, marketing includes listening as well as telling and sometimes listening is more valuable.

6 Managing Your Village

To be an all-volunteer organization or to pay for staff; that is the decision! (See more in Chapter 3) The Village leadership has made this decision early on. Should the Village operate as an all-volunteer program or should the Village hire paid staff to manage the operations of the Village program. The decision of whether to have a volunteer program or use paid staff is a major decision and will affect the way in which your Village operates. Villages across the country and in this area are operating using both formats. Either format can be successful in serving the needs of the Village members. Which format is best for your Village?

See page 18 for pros and cons of paid staff management and all-volunteer Villages.

Effective management systems are required in order for your Village program to run smoothly, for you to stay on track, achieve your goals and measure your success.

Management Committee

An approach that has proven successful in many Villages is the establishment of a Management Committee. The duties of the Management Committee include monitoring the operations of the Village, creating management forms, monitoring the forms, as well as creating the budgets and monitoring the cash flow. The committee can also monitor the operations of the organization, making recommendations for change as needed. This committee, along with the Executive Committee can also be responsible for monitoring the rules and regulations of the organization as well as the Village bylaws. This committee should meet regularly, once a month should be adequate unless a special need arise.

Standard Forms

Developing standard forms for ongoing activities should be addressed before you launch your Village program. The following are samples of the forms you should develop.

Job Descriptions: The importance of clear, well written job descriptions is addressed in Chapter 8, The Care & Feeding of Volunteers. Volunteer job descriptions are important for both an all-volunteer Village or a Village using paid staff. Setting expectations helps everyone do their job better and makes for a more effective program.

Membership Forms: Capturing all the necessary information from your members and potential members is helpful in a variety of areas. Membership forms should capture all the pertinent contact information. This information may be later used in a membership directory or simply for communication purposes by the Village leadership and volunteer program managers. One of the lifelines of your Village is an accurate database of Village members. Membership forms should also supply the leadership with feedback about resident's needs and interests. The needs and interests of Village members create the basis for your Village programming in order that it is relevant and responsive. This may change over time so it is necessary to continually update this part of the form to keep your information current.

Volunteer Forms: Volunteer forms detail the volunteer positions available. The form provides the leadership with a database of interested and qualified volunteers and their contact information. The volunteer forms should provide space to allow the volunteer to indicate the amount of time they are willing to give to the project for which they are volunteering. The volunteer form should also provide an indication of the minimum amount of time required for each job. Allow volunteers to prioritize their volunteer preferences. Don't forget space to capture the volunteer's contact data.

Feedback, Quality Assessment and Record Keeping Forms: Again, these are important exercises whether you are an all volunteer Village or have paid staff. Feedback, quality assessment and record keeping are all part of controlling and improving the services offered members. It is a means of measuring success as well as recording areas of improvement.

Feedback: Feedback from your volunteers as well as from those receiving services is important in helping leaders and staff assess the quality of service provided. Feedback helps re-enforce those things that are going well and supports maintaining successful activities. Feedback also provides information to help increase the effectiveness of the services being offered. Developing a standardized feedback format with appropriate documentation helps the Village leadership assess the effectiveness of their programming, their volunteers and their management systems. Create a form that elicits routine and standardized information from those that deliver services and those that receive services.

Record Keeping: Record keeping is an important tool to assess the success or failure of a particular program. Keep records of how many people in your Village attend a particular program, the amount of money spent on the program, any outside contractors required to help produce the program including contact information and how many volunteers helped and in what capacity. Records must be kept in a designated place in an organized manner in order for them to be accessible for others to use and for evaluation purposes.

Organizational Bylaws

An important part of creating your Village is creating organizational bylaws that will govern your Village's operation. The Bylaws are your organizational structure and provide guidance on the operation of your Village. See Chapter 8, Sample Director for sample By-Laws that you can use or modify for your Village.

Tax Exempt Status

A Village organization should consider tax-exempt status filing for 501(c) 4 status with the IRS. To be eligible, a civic organization or Village must be operated exclusively for the promotion of social welfare and not organized for profit.

See page 23 for additional information on creating a 501(c)3).

Unlike 501(c) 3 status, a 501(c) 4 organization may be politically active. Also, contributions to a 501(c) 4 are not deductible. The following are excellent online resources for learning more about 501(c) 4 status:

- <http://www.irs.gov/charities/nonprofits/article/0,,id=96178,00.html>
- <http://nonprofitmanagement.suite101.com/article.cfm/what> is a 501c4 organization

Local bar associations may be able to direct your Village leadership through “pro bono” or reduced-cost legal services from lawyers experienced in the non-profit sector. In Montgomery County, contact the Maryland Bar Foundation Pro Bono Program at 301-424-7651, if you are looking for assistance. Their address is: 27 West Jefferson Street, Rockville, MD 20850.

Ethics and Confidentiality

Working as a volunteer often provides personal and sensitive insights into the lives of those receiving volunteer services. Volunteers must be aware of the necessity of not talking about a recipients’ health, financial condition or other personal matters that volunteers may learn as a result of offering service to a Village Resident. Creating a “Code of Ethics” for volunteers to sign and follow is an important document to develop and use. You may receive pro bono help from Montgomery County Bar Association or from the Montgomery County Volunteer Center.

See Appendix B for sample ethics form and guidelines

Strategic Planning: Another Phase of Management

Once you have started your Village, accomplished the initial steps of planning and implementing your Village program, a next and important step is for your leadership team to enter into a strategic planning exercise. Strategic planning is a process where the members on your team obtain consensus on the direction of your organization, in this case Village, will take for a time period of 1 – 3 years. A strategic plan gets your leadership team on the same page focusing on the direction of your village for a given period of time. It also has a purpose of building trust amongst your leadership. It is best that the strategic plan exercise be led by someone outside your Village organization, someone who is objective and has no vested interest in the outcome of the plan.

A Strategic Plan
Must have
a mission, goals, and
objectives.
Most have vision and
values
May also have
background/ stories,
results/targets,
implementation, roles,
timeline, a budget
forecast, and evaluation

Planning Process

- Data Gathering & Analysis
 - Current State
 - Strengths, Weaknesses, Opportunities & Threats (SWOT)
- Strategic Plan: 1 – 3 years
 - Future State
 - Mission, Vision, Values
- Implementation of Plan
 - Budget
 - Job Descriptions
 - Evaluation

Tracking Your Strategic Plan and Setting Benchmarks

It is important to build into your strategic planning process regular and routine tracking and evaluation of the goals set out in the strategic plan. Ongoing evaluation will help you get back on track toward achieving your goals. It is important to measure your successes and your challenges in order to evaluate the next steps you need to take to meet the needs of the members of your Village. Planning is a wasted exercise without tracking and evaluating how your actual program measures up to the goals you established for the organization during your strategic planning process.

7 The Care and Feeding of Volunteers

The success of your Village will depend on the success of your volunteer program – and the success of your volunteer program depends on up-front training and expectation setting for Village volunteers. Whether you choose to hire paid staff or operate an all volunteer program, the effectiveness of your volunteer program has a direct relationship on your ability to meet the goals and needs established by your Village. Villages are based on the premise of neighbors helping neighbors.

The results of your community assessment will identify the services members of your Village are interested in receiving. Identifying the services will lead to an understanding of the type and scope of volunteer services required to meet community needs. For each volunteer service required, a job description should be written that describes the job to be done and the volunteer expectations for delivering that service. Setting expectations for your volunteers and understanding their motivations will go a long way to creating a positive experience for volunteers.

A job
description
should be
written for
each volunteer
service
required.

Hiring Volunteers

Selecting individuals for volunteer jobs is no less important than selecting employees in a business. In both instances you will have the best success if you match job description and expectation with the individual's skills and motivations. Just as staffing for a job requires an interview, staffing for volunteer positions also requires an interview. You want to find a match between the potential volunteer's motivation and the volunteer job description and expectation. If you don't find a match, perhaps you can coach that potential volunteer into another volunteer position that more closely matches the volunteer's motivation and skills.

The goal of the volunteer interview is to determine:

- Volunteer experiences and skills
- Volunteer's motivation for seeking the volunteer job
- Sharing of the job description of the volunteer job
- Clearly outlining the expectation for the volunteer job
- Clearly define the time commitment required for the volunteer job

Creating an effective volunteer program requires creating an effective volunteer management system. Ultimately, someone needs to be identified as the person in charge, the person that makes the final decision regarding the volunteer program and its goals and objectives. In short where does the buck stop?

Volunteer Management and Training

You may create a volunteer management system that has several layers. For example, you may want to organize your Village by blocks with block captains to recruit members, disseminate information, to report needs of residents on their block, to bring services to residents as they need. You may want to create a management system that organizes volunteers by project. However you decide to organize your volunteer program and however many levels of volunteer managers you decide are best for your Village, remember, to be effective, one person ultimately has to be in charge, you need to decide where the buck stops and make sure all your volunteers are clear who that person is.

To be effective,
one person
ultimately has
to be in charge.

Volunteer Job Suggestions

Here are samples of jobs that your Village might want to consider for their volunteer program.

- Transportation
- Handyman, fix it
- Shut in visits
- Pet Care
- Errands
- Financial assistance (check writing, checkbook balancing)
- Technical help
- Social networking
- Program director
- Communications and Marketing
- Respite Visits
- Meals

Volunteer Training

Effectively hiring and employing your volunteers requires skill and practice. As you work through creating your Village you may want to pursue volunteer training seminars to give you pointers about handling training effectively. Here is a list of resources that can work with your leadership team to organize training sessions for your volunteer managers and may also be sources for liability insurance coverage*.

- **Regional Services Centers**
- **Montgomery County Volunteer Center** - Phone 240-777-2600, email volunteer@montgomerycountymd.gov
- **Iona Senior Services** - Phone 202-966-1055, website www.iona.org
- **Bethesda Help*** - Phone 301-365-2022, email info@bethesdahelp.org
- **Montgomery County Fire & Rescue as well as local hospitals** offer CPR training and other first aid training that volunteers might need dealing with a senior population.

Key Points for the Early Stages of Volunteer Management

Start Small: Focus on two volunteer tasks as a launching point and recruit specifically for those tasks.

Complete two job descriptions so that perspective volunteers will know exactly what they are expected to do. Anticipate roughly 8 – 12 volunteers screened and trained during this first cycle.

Continually Assess Needs: Don't rely on people who said they might need services six months ago. Keep lists of potential clients updated. Until you recruit and train volunteers to meet a specific need, you cannot guarantee helping someone.

You Are a Broker: This means that you have to make sure that any volunteer you refer to a client must be trustworthy, have a clean driving record, and should be carefully trained. These volunteers will be representatives of your Village, and since word of mouth will be an important part of maintaining a viable Village, you may want to do all you can to deliver services effectively.

Don't Forget the "Harry Truman" Rule; Identify where the buck stops! In all aspects of recruiting, screening, and training volunteers, there must be one or two people who are ultimately responsible for coordinating these efforts. Once your program becomes operational, it will be even more critical that both clients and volunteers know the chain of command for any issues they might have.

Volunteer Commitment & Sustainability

Inherent in a volunteer organization is sustaining commitment. One of the biggest challenges in your Village organization is to keep your volunteers committed to their jobs. Volunteer training, setting job expectations, understand the motivation of our volunteers are all important parts of keeping your group of volunteers motivated and involved.

Something to keep in mind as you develop your volunteer program, research has shown that today's volunteers respond better to short-term projects rather than long-term commitments. On the other hand, you will find some in your community that like the idea of a long term commitment, they are able to plug in the time with

predictability and like to know, for instance, that every Wednesday from 9am – noon they will be volunteering to drive neighbors to their doctor's appointments. With these different preferences in mind, you can plan your volunteer jobs for both short-term phases and long term, ongoing projects. Constant and ongoing communication from the volunteer managers to the volunteers goes a long way to keeping volunteers happy and involved.

Legal and Liability Issues

Villages should consult with their own legal advisor on liability issues. Questions about liability issues have arisen regarding volunteer protection should anything happen to the recipient of the volunteer services during the time that the volunteer is delivering those services. For instance, if a volunteer is driving a Village member to a doctor's appointment and gets into an accident, will the volunteer be protected or is specialized insurance necessary? One of the benefits of Burning Tree Village's partnership with Senior Connection is that Senior Connection provides liability insurance for that Village's volunteers.

There appears to be some liability coverage for volunteers under the Maryland Good Samaritan Act (see summary below). Maryland law 5-309, 5-406, and 5-407 covers personal liability for charitable organizations utilizing volunteers for such purposes as driving to doctor's appointments, driving to grocery stores or home visits.

Confidentiality

Helping your volunteers understand the need for privacy and confidentiality should be a key part of volunteer training. Your volunteers may enter a home and discover a resident who is not eating or a resident who is a "hoarder." Situations such as these should be reported to a trained social worker, the volunteer should not take it upon themselves to solve problems of depression, health or other psychological issues. A volunteer may call the Montgomery County Mental Health Hotline for 24-hour assistance for a resident in distress, 301-738-2255.

See Appendix B for red flags and mental health resources.

In addition, the volunteer must also clearly understand that what they see and experience with a resident is private information and must not be discussed with neighbors, friends, or family. It is a good idea to create a confidentiality form for each volunteer to sign. The form will re-enforce the importance of confidentiality.

Summary

A volunteer is defined as a director, officer, trustee, or other person who provides services or performs duties for a charitable organization without receiving compensation.

Volunteers are not personally liable for damages in any suit if:

- The organization maintains insurance covering liability incurred by the organization or its agents or both as a result of acts or omissions of its agents in providing services or performing duties on behalf of the organization
- The insurance policy covers acts or omissions, which are the subject matter of the dispute, and there is not a reason for denial of the coverage by the insurance carrier. See the statute for exact coverage amounts

Volunteers are not liable for damages beyond the limits of any personal insurance that the volunteer may have in a suit arising out of any act or omission committed in connection with the services provided to the organization, unless:

- The volunteer knew or should have known of an act or omission on the part of another volunteer or the volunteer authorizes, approves or actively participates in the act or omission.

- After the act or omission the volunteer with full knowledge of the act or omission ratifies it.
- The act or omission constitutes gross negligence, reckless, willful, or wanton misconduct or intentionally tortuous conduct.
- It was found that they acted with malice or gross negligence to the extent that the damages exceed the limits on the organization's insurance policy.

Most insurance companies cover passenger liability as part of their policy regarding liability. If a volunteer is concerned about exposure, they should contact their insurance agent/company directly and explain that they are volunteering and want to know if they are covered in the event of an accident.

Volunteers are a mainstay of our Village organization. The whole premise of the Village concept is neighbors helping neighbors. Establishing a strong volunteer program early on, clearly defining expectations and carefully managing your volunteer resources is a good formula for your Village program success.

Volunteer Management Software

(many of these have online demos and free trials)

- [Blackbaud](http://www.blackbaud.com/) makes a variety of products that include volunteer management components (although the company rarely uses the word "volunteer" in describing their products) - <http://www.blackbaud.com/>
- [CERVIS](http://www.cervistech.com/) (Community Event Registration and Volunteer Management System) - <http://www.cervistech.com/>
- [CiviCore Volunteer Management](http://www.civicore.com/index.cfm?fuseaction=solutions.display&content=Volunteermanagement) - <http://www.civicore.com/index.cfm?fuseaction=solutions.display&content=Volunteermanagement>
- [CiviCRM](http://www.civicrm.org/), open source and freely downloadable - <http://www.civicrm.org/>
- [OrgAction Online Volunteer Database](http://www.orgaction.com/) - <http://www.orgaction.com/>
- [ROVIR, the Retriever of Volunteer Information and Reporting](http://www.rovirinfo.com/) - <http://www.rovirinfo.com/>
- [Samaritan Technologies](http://www.samaritan.com/) (eCoordinator) - <http://www.samaritan.com/>

- [Son of Service \(SOS\)](http://sos.sourceforge.net/) (free) - <http://sos.sourceforge.net/>
- [Tools for Organizations](http://www.toolsfororganizations.com/habitat/scheduling.php)/Habitat Scheduling - <http://www.toolsfororganizations.com/habitat/scheduling.php>
- [TechSoup.org](http://www.techsoup.org)(IT organization with great resources for discounted software and some hardware) – [www.TechSoup.org](http://www.techsoup.org)
- [V2/Volunteer2/Volunteer Squared/Volunteer Impact](http://www.volunteer2.com/) - <http://www.volunteer2.com/>
- [Volgistics](http://www.volgistics.com/), Red Ridge Software - <http://www.volgistics.com/>
- [Volunteer Event Management \(VEM\)](http://www.volunteersolutions.org/products/vems/) from Volunteer Solutions - <http://www.volunteersolutions.org/products/vems/>
- [Volunteer Spot](http://www.volunteerspot.com/) - <http://www.volunteerspot.com/>
- [Volunteer Reporter](http://www.volsoft.com/) (formerly RSVP Reporter) - <http://www.volsoft.com/>
- [VSys One](http://www.vsysone.com/) - <http://www.vsysone.com/>
- [When to Help](http://whentohelp.com/) - <http://whentohelp.com/>

See Appendix B for more volunteer management resources.

About the Author

Leslie Marks is a native Washingtonian who moved to Montgomery County in 1948. She is a graduate of Bethesda-Chevy Chase Senior High School. She has deep roots in Montgomery County; all three of her children and her two grandchildren live in Montgomery County.

Leslie has spent over 30 years in the building industry, 20 years of which have been dedicated to the senior housing segment of the industry. Ms. Marks was the project manager for the development of Maplewood Park Place, a retirement community in Bethesda, Maryland. She ran the National Association of Home Builders seniors housing program for eight years. She currently consults with builders and developers who want to build age restricted senior housing.

Her volunteer activities include the vice chairmanship of the Montgomery County Vital Living Committee and a member of the Montgomery County Commission on Aging.

About the Bethesda-Chevy Chase Regional Services Center

Montgomery County's Regional Services Centers were charged by the County Council in 1975 with a mission to lead interagency efforts to strengthen communication between the community and various agencies of County Government; coordinate necessary interagency action with respect to the local area; and recommend programs and policies tailored to the local community.

The Bethesda-Chevy Chase Regional Services Area includes neighborhoods in the Bethesda-Chevy Chase, North Bethesda/Garrett Park, Potomac, and Rockville planning areas.

The Bethesda-Chevy Chase Regional Services Center first opened in Bethesda in 1979. The Center was originally housed in the reference room at the Bethesda Regional Library on Arlington Road. In the early 1980's both the Library and the Center needed additional space and the Center moved to Woodmont Avenue. In December, 1996 the Center moved to a brand new County building located in the heart of downtown Bethesda, near the Bethesda Metro Center and above the County's Bethesda Center parking garage.

The Center is located at 4805 Edgemoor Lane, Bethesda, MD 20814. The Center is open on weekdays from 8:30 a.m. to 5:00 p.m. The phone numbers are 240-777-8200 (voice), 240-777-8212 (TDD) and 240-777-8211 (FAX). The Center's e-mail address is *bethesda.citizen@montgomerycountymd.gov*.

Appendix A: Sample Forms

Mission Statement	3
Burning Tree Village	
Sample Survey Questionnaire	4
Burning Tree Village	
Survey Results	8
Burning Tree Village	
By Laws	
Burning Tree Village	14
Palisades Village	21
Sample Exec. Dir. Letter of Agreement	27
Palisades Village	
Job Description for Executive Director.....	28
Palisades Village	
Sample Village Services	29
Palisades Village	
Registration for Services	30
The Senior Connection	
Guidelines for Using Services	33
Burning Tree Village & The Senior Connection	

Burning Tree Village Mission Statement

Burning Tree Village (BTV) helps neighbors remain in their homes as they age (“age in place”). We do this through volunteer activities, educational and social programs, and through partnerships with other individuals and organizations that complement our volunteer activities. By engaging all residents in these activities, BTV enhances the quality of life of the entire community.

BURNING TREE NEIGHBORHOOD AGING PROJECT

INSTRUCTIONS: Please complete one survey for your entire household.

PART I. What you might want from the neighborhood

1. Do you hope to remain in your home as you get older (retirement age)?

___ Yes ___ No ___ Not sure

2. Do you plan to move into a senior residence when you are older?

___ Yes ___ No ___ Not sure

3. Do you have family or others living in the area who might assist you?

___ No ___ Siblings ___ Adult children ___ Other close family ___ Others

4. Please indicate the number of people in your household in each age category:

___ 15-24 ___ 25-34 ___ 35-44 ___ 45-54 ___ 55-64 ___ 65-74 ___ 75-84 ___ 85+

5.

	Place a check mark for a "Yes" answer to the following questions.	Do you now use any of the following services?	Do you pay for this service?	Do you receive unpaid assistance (from family, friend, public, etc.) to receive this service?	Do you think you will need any <u>additional</u> services in the future?
1	Transportation to medical appointments				
2	Transportation to or assistance with non-medical destinations (shops, bank, hair salons, movies, etc.)				
3	Grocery shopping: Transportation to grocery shopping				
4	Grocery shopping: someone to shop for you				
5	Snow removal/leaf removal				
6	Gardening				
7	Lawn mowing				
8	Meal preparation in your home				

BURNING TREE NEIGHBORHOOD AGING PROJECT

	(Continuation) Place a check mark for a "Yes" answer to the following questions.	Do you now use any of the following services?	Do you pay for this service?	Do you receive unpaid assistance (from family, friend, public, etc. to receive this service?	Do you think you will need any <u>additional</u> services in the future?
9	Meal delivery				
10	Bathing/showering				
11	Medication reminders				
12	Emergency response system (e.g. Lifeline)				
13	Telephone check-ins				
14	Housekeeping				
15	Laundry				
16	Bill paying				
17	Tax preparation				
18	Home maintenance (painter, electrician, handyman, etc.)				
19	Home modification/adaptation for safety or accessibility				
20	Friendly visiting				
21	Social activities (clubs, dinners, teas, etc.)				
22	Help with your computer				
23	Pet care				
24	Plant care				
25	Trash take out/ return trash cans				
26	Other (please specify)				

6. We hope that the new organization, acting on behalf of a large number of neighbors, will be able to negotiate discounted, yet quality services. If such an organization would help you remain in your own home as you age, would you be willing to pay membership fees to enable the new organization to refer you to these services?
 ___Yes ___No ___Depends on cost

BURNING TREE NEIGHBORHOOD AGING PROJECT

Part II – What might you volunteer to offer the neighborhood?

To maintain confidentiality, your survey responses in Part I will be separated from identifying information in this part of the survey.

Space is provided for answers from two persons. If your household needs more space, please add information on the reverse side of this form.

7.

	Please check the type of help you might be willing to give a neighbor in need.	Person 1		Person 2
1	Transportation to medical appointments			
2	Transportation to or assistance with non-medical destinations (shops, bank, hair salons, movies, etc.)			
3	Grocery shopping: Transportation to grocery shopping			
4	Grocery shopping: someone to shop for you			
5	Snow removal/leaf removal			
6	Gardening			
7	Lawn mowing			
8	Meal preparation in your home			
9	Meal delivery			
10	Bathing/showering			
11	Medication reminders			
12	Emergency response system (e.g. Lifeline)			
13	Telephone check-ins			
14	Housekeeping			
15	Laundry			
16	Bill paying			
17	Tax preparation			
18	Home maintenance (painter, electrician, handyman, etc.)			
19	Home modification/adaptation for safety or accessibility			
20	Friendly visiting			
21	Social activities (classes, clubs, dinners, teas, etc.)			
22	Help with your computer			
23	Pet care			
24	Plant care (indoor)			
25	Trash take out/return trash cans			
26	Other (please specify)			

BURNING TREE NEIGHBORHOOD AGING PROJECT

8.

Person 1

Person 2

	Yes	No	Not sure		Yes	No	Not sure
Would you like to help develop the organization? (please check for each person)							

9.

Person 1

Person 2

If you would like to be kept informed of any progress or developments with this project, please check here_____.

If you would like to be kept informed of any progress or developments with this Project, please check here_____.

10. Please tell us who you are so we may be in touch with you.

Person 1

Person 2

Name _____

Name _____

Address _____
Bethesda, Maryland 20817

Address _____
Bethesda, Maryland 20817

Email _____

Email _____

Thank you for taking the time to participate. A summary of the results will be available in the near future. Your individual responses will remain confidential.

Please return the completed survey by _____ to the following:

February 2008

AGING-IN-PLACE SURVEY RESULTS BURNING TREE AGING PROJECT

A survey was conducted in November 2007 to assess the needs and resources of the neighborhood with respect to aging in place. A copy of the survey is appended to this analysis of survey results.

Surveys were mailed to the 440 households listed in our 2006 Neighborhood Directory, which includes the area bounded by Beech Tree Road, River Road, Wilson Lane, and Maryknoll Avenue, plus off-shoots. By the November deadline, 78 had been returned.

A second mailing to all non-respondents was not feasible. Instead, a random 1 in 5 sample of non-respondents was identified, and follow-up phone calls were made to this group seeking to learn why they did not respond. In general, the people reached in the follow-up were interested in the aging-in-place concept, but they just had not gotten around to completing the survey. Quite a few offered to do so and were supplied new survey forms, and this helped increase responses to 92 (21%).

Only a few of the non-respondents reached were enthusiastically uninterested. In a couple of cases, people thought the surveys were meant to be completed only by elderly people. Also, a few people had moved out of the area, so the true response rate is actually somewhat higher than 21%.

Surveys were sorted by household age, groupings based on the oldest person in the household. That is, if there was one person age 65-74 and one age 75-84, it was identified as a 75-84 household. In almost all cases, however, household occupants fell into the same age category. Part I data (wishing to stay in home, willingness to pay for services, etc.) are based on households; Part II data (willingness to help, etc) are based on people (one or two per household could respond). The age distribution of the survey respondents is shown in Table 1.

Table 1. Age Distribution of Survey Respondents

Age Groups	Households		Individuals	
	Number	%	Number	%
All ages	92	100.0	140	100.0
35-44 years	3	3.3	5	3.6
45-54	14	15.2	20	14.3
55-64	14	15.2	20	14.3
65-74	22	23.9	37	26.4
75-84	28	30.4	43	30.7
85 years and over	11	12.0	15	10.7

We can roughly approximate the demographics of our neighborhood, and it is apparent that older residents were more apt to respond. About two-thirds of the household respondents were aged 65 years old and over (Table 1), which compares with an estimated 20% of the population in our neighborhood based on census information. Note that for those rare households with a 65-74 and a 75-84 year-old resident, it is not possible to identify age of individual respondents, so they both remain in the older group; this biases the sample upward to a minor extent.

The main results are presented below by age group (less than 65 years, 65 years old and over) and for the total sample. There were 31 households in the less than 65 group, and 61 in the 65+ group, as shown in Tables 2 through 5, below.

Part I. Households

Table 2. Households That Hope to Remain in Home

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	92	100.0	31	100.0	61	100.0
Yes	71	77.2	20	64.5	51	83.6
No	7	7.6	3	9.7	4	6.6
Not sure	13	14.1	8	25.8	5	8.2
No response	1	1.1	0	0.0	1	1.6

Results in Table 2 show that overall, over $\frac{3}{4}$ of the households hope to remain in their home (77%), and the proportion is somewhat higher for seniors, 84%. About 8% of the seniors' households were not sure whether they wanted to remain in their homes or not.

Table 3. Households That Plan to Move to a Senior Residence

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	92	100.0	31	100.0	61	100.0
Yes	5	5.4	2	6.5	3	4.9
No	38	41.3	11	35.5	27	44.3
Not sure	48	52.2	18	58.1	30	49.2
No response	1	1.1	0	0.0	1	1.6

In Table 3, for households in which the respondent was 65 years old and over, only 5% indicated that they intend eventually to move into a seniors' residence. However, almost half the respondents in this age group are not sure.

Table 4. Households That Have Family Around to Assist

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	92	100.0	31	100.0	61	100.0
Yes	55	59.8	15	48.4	40	65.6
No	34	37.0	14	45.2	20	32.8
No response	3	3.3	2	6.5	1	1.6

Over half (60%) of the households in our neighborhood have relatives around who can assist. Among seniors, the proportion is even higher, two out of three (Table 4).

Table 5. Households That Are Willing to Pay for Services

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	92	100.0	31	100.0	61	100.0
Yes	36	39.1	12	38.7	24	39.3
No	6	6.5	1	3.2	5	8.2
Depends on cost	46	50.0	16	51.6	30	49.2
Other or no response	4	4.3	2	6.5	2	3.3

Table 5 shows that about 4 out of 10 senior households are willing to pay for services that enable them to age in place, but that almost half (49%) are concerned about costs.

Part II. Individuals

Table 6. Individuals That Are Willing to Help Neighbors

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	140	100.0	95	100.0	45	100.0
Yes	67	47.9	44	46.3	23	51.1
No	24	17.1	18	18.9	6	13.3
Not sure	39	27.9	25	26.3	14	31.1
No response	10	7.1	8	8.4	2	4.4

A large number of persons living in our neighborhood are willing to help their neighbors (Table 6). Almost half the respondents (48%) responded affirmatively to the survey with respect to wanting to help their neighbors. The proportion is about the same for seniors as for those under 65 years.

Table 7. Individuals That Area Willing to Help Develop the Organization

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	140	100.0	45	100.0	95	100.0
Yes	33	23.6	16	35.6	17	17.9
No	54	38.6	18	40.0	36	37.9
Not sure	32	22.9	9	20.0	23	24.2
No response	21	15.0	2	4.4	19	20.0

We asked whether individuals in our neighborhood are willing to help develop the organization that would assist our neighbors to age in place (Table 7). Over one-third of those under 65 indicated their interest (36%), and about one in five seniors (18%) expressed such a willingness. We are encouraged that we have a potential cadre of neighbors who can help us implement our initiative. An additional 23% indicated that they are not sure, and therefore expand the potential pool of helpers.

Table 8. Individuals That Want to Be Kept Informed

	All Ages		Less than 65 Years		65 Years and Over	
	Number	%	Number	%	Number	%
Total	140	100.0	45	100.0	95	100.0
Yes	86	61.4	27	60.0	59	62.1
No	0	0.0	0	0.0	0	0.0
No response	54	38.6	18	40.0	36	37.9

Well over half the respondents (61%) wish to be kept informed about efforts in our neighborhood to facilitate aging in place (Table 8).

Respondents were presented with a list of 24 types of help and asked to indicate those they now use and anticipate using (Which do you use now? Which do you pay for? Are there ones you now get gratis? What services do you anticipate needing in the next five years?). In particular, the question concerning anticipated types of help needed in the next five years was intended to tap into potential demand for services in our neighborhood that commercial coordinators of services might provide. Responses to this question were tallied. Unfortunately, this provides an incomplete picture of future needs. For example, many respondents concentrated on the first column (services now used) but skipped the others, although it is not logical that services now used would not be needed in the next five years. Of the 31 families in the less than 65 group, 12 (39%) indicated they would need one or more types of help in the next five years; 33 of the 61 families in the 65+ group (54%) said so. The most frequently checked items were home maintenance (31 households); housekeeping (28), snow/leaf removal (28), gardening/lawn mowing (26), transportation to medical appointments (15), and bill paying or tax preparation assistance (14). These were the leading items in both age groups.

The 67 people who indicated willingness to help their neighbors were asked which of the 24 types of help they would provide. Quite a few people did not indicate types of help. Of those who specified types, the leaders were friendly visiting (32), grocery shopping assistance (26), grocery shopping transportation (26), telephone check-ins (25), transportation to medical appointments (22), transportation to non-medical destinations (18). Note that except for transportation to medical appointments, there is no overlap with the list of types of services most frequently needed in the next five years.

Questions about the survey methodology and analysis may be directed to Allan Williams at email awilliams@ihs.org or to Leslie Kessler at email lesliekessler@gmail.com

BURNING TREE NEIGHBORHOOD AGING PROJECT

INSTRUCTIONS: Please complete one survey for your entire household.

PART I – What you might want from the neighborhood

Do you hope to remain in your home as you get older (retirement age)?

☐ Yes ☐ No ☐ Not sure

Do you plan to move into a senior residence when you are older

☐ Yes ☐ No ☐ Not sure

Do you have family living in the area who might assist you?

☐ No ☐ Siblings ☐ Adult children ☐ Other close family

Place a check mark for a 'YES' answer to the following questions.		Do you now use any of the following services?	Do you now purchase this service?	Do you now receive unpaid assistance (from family, friend, public, etc.) to receive this service?	Do you anticipate needing this service in the next 5 years?
1	Transportation to medical appointments				
2	Transportation to or assistance with non-medical destinations (shops, bank, visiting hair salon, movies, etc.)				
3a	Grocery shopping: transportation				
3b	Grocery shopping: someone to shop for you				
4	Snow removal/leaf removal				
5	Gardening/lawn mowing				
6	Meal preparation in your home				
7	Meal delivery				
8	Bathing/showering				
9	Medication reminders				
10	Emergency response system (e.g., Lifeline)				
11	Telephone check-ins				
12	Housekeeping				
13	Laundry				
14	Bill paying or tax preparation assistance				
15	Home maintenance (painter, electrician, handyman etc.)				
16	Home modification/adaptation for safety or accessibility				
17	Friendly visiting				
18	Social activities (classes, clubs, dinners, teas, etc.)				
19	Help with your computer				
20	Pet care				
21	Plant care (indoor)				
22	Trash take out/return trash cans				
23	Other				

It is presumed the new organization, acting on behalf of a large number of neighbors, will be able to negotiate discounted, yet quality services. If it meant being able to remain in your own home as you age, would you be willing to pay membership fees to enable the new organization to refer you to these services?

☐ Yes ☐ No ☐ Depends on cost

Please indicate the number of people in your household in each age category:

15-24 ____ 25-34 ____ 35-44 ____ 45-54 ____ 55-64 ____ 65-74 ____ 75-84 ____ 85 + ____

BURNING TREE NEIGHBORHOOD AGING PROJECT

PART II — What might you offer the neighborhood?

To maintain confidentiality, your survey responses will be separated for tabulation from the following identifying information.

Space is provided for answers from two persons. If your household needs more space to volunteer, please add information on the reverse side of this form. Please print as legibly as possible.

PERSON 1

- A1.** Would you be willing and able to assist with or offer any of the services listed in the chart in Part I to a neighbor in need?

☐ Yes ☐ No ☐ Not sure

Please look at the list in Part I, including your additions to 'Other.' Which might you be willing to assist with or offer? Please write the number or name:

- B1.** Would you like to help develop the organization?

☐ Yes ☐ No ☐ Not sure

PLEASE TELL US WHO YOU ARE SO WE MAY BE IN TOUCH WITH YOU.

Name

Address

BETHESDA, MARYLAND 20817

Phone

Email

- C1.** ☐ Would you like to be informed of any progress or developments with this project? Please check this box to give permission to add your contact information to our contact list or directory.

PERSON 2

- A2.** Would you be willing and able to assist with or offer any of the services listed in the chart in Part I to a neighbor in need?

☐ Yes ☐ No ☐ Not sure

Please look at the list in Part I, including your additions to 'Other.' Which might you be willing to assist with or offer? Please write the number or name:

- B2.** Would you like to help develop the organization?

☐ Yes ☐ No ☐ Not sure

PLEASE TELL US WHO YOU ARE SO WE MAY BE IN TOUCH WITH YOU.

Name

Address

BETHESDA, MARYLAND 20817

Phone

Email

- C2.** ☐ Would you like to be informed of any progress or developments with this project? Please check this box to give permission to add your contact information to our contact list or directory.

THANK YOU for taking the time to participate. A summary of the results will be available in the near future. Your individual responses will remain confidential.

BYLAWS
OF
BURNING TREE VILLAGE, INC.
(a Maryland nonstock corporation)

ARTICLE I

NAME, PRINCIPAL OFFICE, AND REGISTERED AGENT

1. NAME OF CORPORATION. The name of the corporation shall be Burning Tree Village, Inc. (hereinafter the "Corporation").
2. PRINCIPAL OFFICE. The principal office of the Corporation shall be located in such place, within or without the State of Maryland, as the Board of Directors shall from time to time determine.
3. RESIDENT AGENT. The resident agent of the Corporation shall be a resident of the State of Maryland with an address in the State as determined from time to time by the Board of Directors.

ARTICLE II

PURPOSES

The purposes for which the Corporation is formed are as follows: to offer relief to elderly and disabled persons residing in the Burning Tree area of Montgomery County, Maryland, by organizing and providing volunteer services to meet their special needs, including transportation, shopping assistance, and friendly visiting; dissemination of useful information, sponsorship of group activities, and facilitating access to needed services. The Corporation is organized exclusively for charitable and educational purposes under section 501(c)(3) of the Internal Revenue Code of 1986, as amended, or corresponding section of any future federal tax code.

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in this Article II. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these Bylaws, the Corporation shall not carry on any other activities not permitted to be carried on (i) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code 1986, as amended or corresponding section of any future federal tax code, or (ii) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code of 1986, as amended, or corresponding section of any future federal tax code.

ARTICLE III
BOARD OF DIRECTORS

1. FUNCTIONS AND DEFINITIONS. The Corporation shall have no members. The Corporation shall be managed by a governing board, which is herein referred to as the “Board of Directors” or “directors.” The word “director” or “directors” likewise herein refers to a member or to members of the governing board. The Board of Directors shall have all the privileges and obligations enjoyed by or imposed upon the members of a nonstock corporation having members. The use of the phrase “entire board” herein refers to the total number of directors which the corporation would have if there were not vacancies.

2. QUALIFICATIONS AND NUMBER. Each director shall be at least eighteen (18) years of age. A director need not be a citizen of the United States or a resident of the State of Maryland. The initial Board of Directors shall consist of nine (9) persons. Thereafter, the number of directors constituting the entire board shall be such number as the Board determines, subject to a minimum of three (3), provided that any action of the directors to effect such increase or decrease shall require the vote of a majority of the entire Board. No decrease shall shorten the term of any incumbent director.

3. ELECTION AND TERM. The first Board of Directors shall consist of those persons named as the initial directors in the Articles of Incorporation and shall hold office until the first annual meeting of directors and until their successors have been elected and qualified. Directors shall serve for a term of three (3) years, with the term of approximately one-third (1/3) of all the directors to expire each year, as follows. At the first meeting of the initial directors, they shall divide themselves into three (3) classes with as equal a number of directors in each class as possible. Thereafter, directors who are in the first class shall hold office until the next annual meeting and until their successors have been elected and qualified. Directors who are in the second class shall hold office until the second annual meeting and until their successors have been elected and qualified. Directors who are in the third class shall hold office until the third annual meeting and until their successors have been elected and qualified. In the interim between annual meetings or of special meetings called for the election of directors, newly created directorships and any vacancies in the Board of Directors, including vacancies resulting from the removal of directors for cause or without cause, may be filled by the vote of the remaining directors then in office. Each successor to a director shall be assigned to the class of the director whom he or she succeeds. A director elected to a newly created directorship shall be assigned by the Board at the time of his or her election to a class on the basis of having each class consist of as equal a number of directors as possible. Any director may be re-elected to a new three-year term.

4. MEETINGS.

4.01. TIME. Annual, regular, and special meetings of the Board of Directors shall be held at such time as the Board shall fix, except that the first meeting of a newly elected Board shall be held as soon after its election as the directors may conveniently assemble.

4.02. PLACE. Meetings shall be held at such place within or without the State of Maryland as shall be fixed by the Board.

4.03. CALL. No call shall be required for annual or regular meetings for which the time and place have been fixed. Special meetings may be called by the President or Vice President or by a majority of directors then in office.

4.04. NOTICE OR ACTUAL OR CONSTRUCTIVE WAIVER. No notice shall be required for regular or annual meetings for which the time and place have been fixed. Written, oral, or any other mode of notice of the time and place shall be given for special meetings in sufficient time for the convenient assembly of the directors thereat unless the lapse of such time has been waived. The notice of any meeting need not specify the purpose of the meeting. Notice of any adjournment of a meeting of the Board of Directors to another time or place because a quorum is not present shall be given to the directors who were not present at the time of the adjournment and, unless such time and place are announced at the meeting, to the other directors. Any requirement of furnishing a notice shall be waived by any director who signs a waiver of notice before or after the meeting, or who attends the meeting without protesting, prior thereto or at its commencement, the lack of notice to him or her.

4.05. QUORUM AND ACTION. Except as hereinafter provided, a majority of the entire Board shall constitute a quorum. Whenever a vacancy or vacancies in the Board shall prevent a quorum from consisting of a majority of the entire Board as aforesaid, a quorum shall consist of at least one-third of the entire Board. A majority of the directors present, whether or not a quorum is present, may adjourn a meeting to another time and place. Except as otherwise provided by statute or these Bylaws, the vote of a majority of the directors present at the time of the vote, if a quorum is present at such time, shall be the act of the Board.

4.06. PARTICIPATION BY TELEPHONE OR SIMILAR MEANS. Any one or more members of the Board of Directors or of any committee may participate in a meeting of the Board of Directors or of any such committee, as the case may be, by means of a conference telephone or similar communications equipment allowing all persons participating in the meeting to hear each other at the same time, and participation by such means shall constitute presence in person at a meeting.

4.07. CHAIR OF A MEETING. The President, if present and acting, shall preside at all meetings of the Board of Directors. Otherwise, any other director present at a meeting and chosen by a majority of the directors at the meeting shall preside.

5. RESIGNATION. Any director or member of a committee may resign at any time by giving written notice of such resignation to the President or the Secretary. Unless otherwise specified in such written notice, such resignation shall take effect upon receipt thereof by the President or the Secretary, and the acceptance of such resignation shall not be necessary to make it effective.

6. REMOVAL. One or more of the directors may be removed for cause by the Board of Directors.

7. COMPENSATION AND REIMBURSEMENT. Directors and members of any committee shall not be entitled to compensation for their services as directors or committee members, provided that the foregoing shall not prevent a director or committee member from serving the Corporation in any other capacity and receiving reasonable compensation for such other services. The Corporation may reimburse directors and members of any committee for expenses paid on behalf of the Corporation by such directors and members of any committee.

8. ACTION WITHOUT MEETING. Any action required or permitted to be taken by the Board of Directors or by any committee may be taken without a meeting if all members of the Board of Directors or of a committee consent in writing to the adoption of a resolution authorizing the action. In the event of any such action without a meeting, the resolution and the written consents thereto by all of the members of the Board of Directors or of a committee shall be filed with the minutes of the proceedings of the Board of Directors or of a committee as the case may be.

ARTICLE IV

OFFICERS

1. NUMBER, QUALIFICATION, ELECTION, AND TERM OF OFFICE. The Board of Directors shall, at its annual meeting every third year, beginning with 2008 as the first year, elect from among its number a President, Vice President, Secretary, and Treasurer and may elect such other officers and assistant officers as the Board of Directors may from time to time deem advisable. Any two or more offices, except the offices of President and Vice President, may be held by the same person. All officers and assistant officers shall serve a term of three (3) years until the next annual meeting of the Board of Directors at which officers and assistant officers are to be elected or until the election or appointment and qualification of their successors.

2. RESIGNATION. Any officer or assistant officer may resign at any time by giving written notice of such resignation to the President or the Secretary. Unless otherwise specified in such written notice, such resignation shall take effect upon receipt thereof by the President or the Secretary, and the acceptance of such resignation shall not be necessary to make it effective.

3. REMOVAL. Any officer, assistant officer, or agent elected or appointed by the Board of Directors may be removed from office, for cause or without cause, by the Board of Directors.

4. VACANCIES. A vacancy in any office by reason of death, resignation, inability to act, disqualification, removal, or any other cause, shall be filled for the unexpired portion of the term by the Board of Directors.

5. PRESIDENT. The President shall be the principal executive officer of the Corporation and, subject to the direction of the Board of Directors, shall in general supervise and control all of the business, affairs, and property of the Corporation and exercise general supervision over its officers and agents. In general, he or she shall perform all duties traditionally inherent in the office of President and shall see that all orders and resolutions of the Board of Directors are carried into effect.

6. VICE PRESIDENT. During the absence or disability of the President, the Vice President shall exercise all the functions of the President and, when so acting, shall have all the powers of, and be subject to all the restrictions upon, the President. The Vice President shall have such powers and discharge such duties as may be assigned to him or her from time to time by the Board of Directors or the President.

7. SECRETARY. The Secretary shall:

(a) record all the proceedings of the meetings of the Corporation and Board of Directors in a book to be kept for that purpose;

(b) cause all notices to be duly given in accordance with the provisions of these Bylaws and as required by statute;

(c) be custodian of the records and of the seal of the Corporation and cause such seal to be affixed where necessary or appropriate and as duly authorized in accordance with these Bylaws;

(d) keep a register of the post office address of each director which shall be furnished to the Secretary by such director;

(e) see that the books, reports, statements, and all other documents and records of the Corporation required by statute are properly kept and filed; and

(f) in general, perform all duties incident to the office of Secretary and such other duties as are given to him or her by these Bylaws or as from time to time may be assigned to him or her by the Board of Directors or the President.

8. TREASURER. The Treasurer shall:

(a) have charge of and supervision over and be responsible for the funds, securities, receipts, and disbursements of the Corporation;

(b) receive and give receipts for monies due and payable to the Corporation from any source whatsoever;

(c) cause the monies and other valuable effects of the Corporation to be deposited in the name and to the credit of the Corporation in such banks, trust companies, or other depositories as the Board of Directors may select, or as may be selected by any officer or officers or agent or agents authorized so to do by the Board of Directors, in accordance with the provisions of these Bylaws;

(d) cause the funds of the Corporation to be disbursed by checks or drafts, with such signatures as may be authorized by the Board of Directors, upon the authorized depositories of the Corporation, and cause to be taken and preserved proper vouchers for all monies disbursed;

(e) render to the Board of Directors or the President whenever requested a statement of the financial condition of the Corporation as well as his or her transactions as Treasurer, and render a full financial report at the annual meeting of the Board of Directors if called upon to do so;

(f) keep the books of account of all the business and transactions of the Corporation;

(g) be empowered to require from all officers or agents of the Corporation reports or statements giving such information as he or she may desire with respect to any and all financial transactions of the Corporation; and

(h) in general, perform all duties incident to the office of Treasurer and such other duties as are given to him or her by these Bylaws or as from time to time may be assigned to him or her by the Board of Directors or the President.

9. COMPENSATION AND REIMBURSEMENT. The salaries or other compensation of the officers or assistant officers shall be fixed from time to time by the Board of Directors, and an officer or assistant officer shall not be prevented from receiving such salary or any compensation by reason of the fact that he or she is also a director of the Corporation. The Corporation may reimburse officers or assistant officers for expenses paid on behalf of the Corporation by such officers or assistant officers.

ARTICLE V

BOARD COMMITTEES

1. EXECUTIVE COMMITTEE. There shall be an Executive Committee comprised of the President, Vice President, Secretary, and Treasurer. Subject to Section 3 of this Article V and applicable law, the Executive Committee shall act in the name of and with the full power

of the Board of Directors during the intervals between meetings of the Board on any matters requiring action by the Board.

2. OTHER COMMITTEES. The Board of Directors may appoint from among its number one or more other committees, to consist of not fewer than two (2) directors. All committees appointed by the Board of Directors pursuant to this Article V, Section 2, shall serve at the pleasure of the Board. Each such committee may make its own rules of procedures and shall meet where and as provided by such rules or by resolution of the Board of Directors. A majority shall constitute a quorum, and the affirmative vote of a majority of the members of such committee present at the time of the vote shall be necessary for the adoption of any resolution. Each committee shall maintain minutes of its proceedings, a copy of which each committee shall provide to the Board of Directors.

3. AUTHORITY OF COMMITTEES. No committee is authorized to make final decisions on requests for support by the Corporation or applications for assistance made to the Corporation, which shall be approved solely by the Board of Directors. No committee is authorized to amend these Bylaws, approve any merger, or exercise any other power barred to committees by applicable law.

ARTICLE VI

ADVISORY COMMITTEES

The Board of Directors may by resolution establish one or more Advisory Committees of two or more interested individuals to provide advice to the Board regarding matters specified in the resolution establishing each Advisory Committee. The Board shall appoint the members and select the Chairperson of each Advisory Committee, who shall serve at the pleasure of the Board. Each such Advisory Committee may make its own rules of procedures, subject to the approval of the Board, and shall meet where and as provided by such rules or by resolution of the Board of Directors. No resolution or other action adopted by any Advisory Committee shall be binding on the Board of Directors or the Corporation, and no Advisory Committee shall have authority to act in any capacity on behalf of the Board or the Corporation.

ARTICLE VI

MISCELLANEOUS PROVISIONS

1. BOOKS AND RECORDS. The Corporation shall keep at the office of the Corporation within the State of Maryland correct and complete books and records of account and shall keep minutes of the proceedings of the Board of Directors and/or any committee which the directors may appoint; provided that the books and records of account may be kept at an office without the State of Maryland if the Articles of Incorporation shall so provide. Any of the foregoing books or minutes may be in written form or in any other form capable of being converted into written form within a reasonable time.

2. STATEMENT OF AFFAIRS. The President, Vice President, or Treasurer shall prepare annually a full and correct statement of the affairs of the Corporation, to include a balance sheet and a financial statement of operations for the preceding fiscal year, which shall be submitted at the annual meeting and, within twenty (20) days after the meeting, placed on file at the Corporation's principal office in the State of Maryland.

3. CORPORATE SEAL. The corporate seal, if any, shall be in such form as the Board of Directors shall prescribe.

4. FISCAL YEAR. The fiscal year of the Corporation shall be fixed, and shall be subject to change, by the Board of Directors.

5. CONTROL OVER BYLAWS. The directors upon compliance with any statutory requisite may amend or repeal the Bylaws and may adopt new Bylaws, provided that such amendment, repeal, or adoption of new Bylaws is approved by a majority of the entire Board.

6. INDEMNIFICATION. Directors, officers, employees, and agents of the Corporation shall be indemnified by the Corporation for their service to the Corporation to the fullest extent permitted by applicable law.

Adopted by the Board of Directors effective as of April 30, 2008.

PALISADES VILLAGE

BYLAWS

April 13, 2007

ARTICLE I

OFFICE AND REGISTERED AGENT

Section 1. Principal Office. The principal office of Palisades Village shall be in the District of Columbia.

Section 2. Registered Office and Agent. The Corporation shall have and continuously maintain a registered office and a registered agent in the District of Columbia, as required by the District of Columbia Nonprofit Corporation Act. The registered agent shall be either an individual resident of the State or a corporation authorized to transact business in the State.

ARTICLE II PURPOSES

The purposes for which the Corporation is formed are as set forth in the Articles of Incorporation.

ARTICLE III MEMBERSHIP

Section 1. Classes and Qualifications. The Board of Directors shall determine and set forth in separate documents the qualifications, dues, terms, and other conditions of each class of member. There shall be the following classes of members:

- a. Individuals: Individual members shall consist of those individuals who live in the Palisades or Foxhall neighborhoods of Washington, D.C. (or of any adjoining neighborhoods the Board, by resolution, may choose to serve) and who meet any additional requirements for individual membership as may be imposed by the Board of Directors from time to time.
- b. Corporate (or "Associate"): Corporate members shall consist of any business entity that conducts business in the Palisades or Foxhall neighborhoods of Washington, D.C. (or in any adjoining neighborhoods the Board, by resolution, may choose to serve) and who meet any additional requirements for individual membership as may be imposed by the Board of Directors from time to time.
- c. Honorary Members: The Board of Directors may designate individuals who do not qualify under the foregoing categories as honorary members, using such criteria as the Board may develop.

Section 2. Voting Rights. Only individual and corporate members in good standing shall have the right to vote at the annual meeting of the members on those items specified in Section 3 (below), as well as to vote on such other issues as the Board may choose to bring before the members. Each individual member and each corporate member shall have one vote to cast on any matter to be decided at an annual meeting or other business meeting at which matters are put to the members for a vote. Other classes of members may attend meetings, but may not vote.

Section 3. Membership Meetings.

a. There shall be an annual meeting of the members upon such date, time and place as the Board shall determine. During the annual meeting, voting members shall have the right to vote on the following matters only: election of the Board of Directors and officers, approval of the annual budget proposed by the Board, approval of any amendments to the Bylaws that may be proposed by the Board, and [insert any other voting rights here]. Voting on all other matters is expressly reserved for the Board of Directors.

b. Special meetings of the members may be called by the Chair of the Board or upon the request of 25% of the voting members. Members shall receive not less than ten (10) days prior written notice of special meetings. Notice shall be given in the manner specified in Section 2 of Article VII of these bylaws, and the notice shall state the purposes of the special meeting.

Section 4. Quorum. . A quorum shall consist of 50 % of the total voting members present either in person or by proxy. A majority of the votes cast at a meeting at which a quorum is present shall constitute the action of the members.

Section 5. Removal. Any member may be removed from membership, provided a quorum is present, by a three-fourths vote of the voting members present. Removal shall only be for cause, such as failure to pay dues or taking actions which are inimical to the integrity of the Corporation.

ARTICLE IV BOARD OF DIRECTORS

Section 1. Powers. There shall be a Board of Directors of the Corporation, which shall supervise and control the business, property, and affairs of the Corporation, except as otherwise expressly provided by law, the Articles of Incorporation of the Corporation, or these Bylaws.

Section 2. Number and Qualifications. The members of the initial Board of Directors of the Corporation shall be those individuals named in the Articles of Incorporation and shall serve until their successors are elected and qualified. Thereafter, the Board of Directors of the Corporation shall be composed of no less than three (3) and no more than thirteen individuals. The number of directors may be decreased, but no decrease shall have the effect of shortening the term of any incumbent director. At no time shall a majority of the board members also be paid staff.

Section 3. Voluntary Status of Membership. Directors shall not be compensated for their services as Directors. The Board of Directors may elect to have the Corporation reimburse Directors for expenses incurred in the execution of their duties and responsibilities.

Section 4. Election and Term of Office. The members of the Board of Directors shall be elected by the members at the annual meeting of the membership. Directors shall serve for a term of two years, and may succeed themselves for two additional terms, with half of the board terms expiring in even years and half expiring in odd years.

Section 5. Resignation. Any director may resign at any time by giving written notice to the President of the Corporation. Such resignation shall take effect at the time specified therein, or, if no time is specified, at the time of acceptance thereof as determined by the President of the Corporation.

Section 6. Removal. Any director may be removed from such office, with or without cause, by a three-fourths vote of the directors in office at any regular or special meeting of the Board called expressly for that purpose.

Section 7. Vacancies. Vacancies shall be filled by majority vote of the remaining members of the Board of Directors for the unexpired term.

Section 8. Regular Meetings. A regular annual meeting of the Board of Directors of the Corporation shall be held each year, at such time, day and place as shall be designated by the Board of Directors.

Section 9. Special Meetings. Special meetings of the Board of Directors may be called at the direction of the Chairman or by a majority of the voting directors then in office, to be held at such time, day, and place as shall be designated in the notice of the meeting.

Section 10. Notice. Notice of the time, day, and place of any meeting of the Board of Directors shall be given at least ten (10) business days previous to the meeting and in the manner set forth in Section 2 of Article VII. The purpose for which a special meeting is called must be stated in the notice. Any director may waive notice of any meeting by a written statement executed either before or after the meeting. Attendance and participation at a meeting without objection to notice shall also constitute a waiver of notice.

Section 11. Quorum. A majority of the directors then in office shall constitute a quorum for the transaction of business at any meeting of the Board of Directors.

Section 12. Manner of Acting. Except as otherwise expressly required by law, the Articles of Incorporation of the Corporation, or these Bylaws, the affirmative vote of a majority of the directors present at any meeting at which a quorum is present shall be the act of the Board of Directors. Each director shall have one vote. Voting by proxy shall not be permitted.

Section 13. Unanimous Written Consent In Lieu of a Meeting. The Board may take action without a meeting if written consent to the action is signed by all of the directors.

Section 14. Telephone Meeting. Any one or more directors may participate in a meeting of the Board of Directors by means of a conference telephone or similar telecommunications device, which allows all persons participating in the meeting to hear each other. Participation by telephone shall be equivalent to presence in person at the meeting for purposes of determining if a quorum is present.

Section 15. Conflicts of Interest. In the event any director has a conflict of interest that might properly limit such director's fair and impartial participation in Board deliberations or decisions, such director shall inform the Board as to the circumstances of such conflict. If those circumstances require the nonparticipation of the affected director, the Board may nonetheless request from the director any appropriate non-confidential information which might inform its decisions.

"Conflict of interest," as referred to herein, shall include but shall not be limited to, any transaction by or with the Corporation in which a director has a direct or indirect personal interest, or any transaction in which a director is unable to exercise impartial judgment or otherwise act in the best interests of the Corporation.

No director shall cast a vote, nor take part in the final deliberation in any matter in which he or she, members of his or her immediate family, or any organization to which such director has allegiance, has a personal interest that may be seen as competing with the interest of the Corporation.

Any director who believes he or she may have such a conflict of interest shall so notify the Board prior to deliberation on the matter in question, and the Board shall make the final determination as to whether any director has a conflict of interest in any matter. The minutes of the Board meeting shall reflect disclosure of any conflict of interest and the recusal of the interested director.

ARTICLE V OFFICERS

Section 1. Officers. The Officers of the Corporation shall be a President, Vice President, Secretary and Treasurer, and such other Officers and titles as the Board of Directors may determine. The duties of Secretary and Treasurer may be held by the same person.

Section 2. Election and Term of Office. The officers of the Corporation shall be elected by the voting members at the annual meeting of the membership. Officers shall assume their respective duties immediately upon election, and shall hold office for one year or until their respective successors have been duly elected.

Section 3. Resignation. Any officer may resign at any time by giving written notice to the Chairman of the Board or the Secretary. Such resignation shall take effect at the time specified in the notice, or if no time is specified, then immediately.

Section 4. Removal. Any officer may be removed from such office, with or without cause, by a three-fourths vote of the directors in office at any regular or special meeting of the Board called expressly for that purpose.

Section 5. Vacancies. A vacancy in any office shall be filled by the Board of Directors for the unexpired term.

Section 6. President. The President shall be the presiding officer and shall chair all meetings of the Board of Directors, the Annual Meeting, and special meetings of the membership. The President shall be responsible for appointing chairpersons and members of all standing committees. He or she may sign contracts or other instruments, which the Board of Directors has authorized to be executed, and shall perform all duties incident to the office of President as may be prescribed by the Board of Directors.

Section 7. Vice President. The Vice President shall, in the absence or disability of the President, or in the case of any vacancy of the office of President, exercise the powers and perform the duties as may from time to time be required of that person.

Section 8. Secretary. The Secretary shall keep the minutes of the meetings of the Board of Directors; see that all notices are duly given in accordance with the provisions of these Bylaws, ensure staff members keep corporate records; and in general perform all duties incident to the office of Secretary and such other duties as may be assigned by the Board of Directors.

Section 9. Treasurer. The Treasurer shall be responsible for and oversee all matters of the Corporation. The Treasurer shall ensure staff members properly receive and give receipts for moneys due and payable to the Corporation and deposit all such moneys in the name of the Corporation in appropriate banks, and in general perform all the duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him or her by the Board of Directors.

Section 10. Bonding. If requested by the Board of Directors, any person entrusted with the handling of funds or valuable property of the Corporation shall furnish, at the expense of the Corporation, a fidelity bond approved by the Board of Directors.

ARTICLE VI COMMITTEES

Section 1. Committees of Directors. The Board of Directors, by resolution adopted by a majority of the directors in office, may designate and appoint one or more committees, each consisting of two or more directors, which committees shall have and exercise the authority of the Board of Directors in the governance of the Corporation. However, no committee shall have the authority to amend or repeal these Bylaws, elect or remove any officer or director, adopt a plan of merger, or authorize the voluntary dissolution of the Corporation.

Section 2. Executive Committee. Between meetings of the Board of Directors, on-going oversight of the affairs of the Corporation may be conducted by an Executive Committee, the membership of which shall be as set forth in a resolution of the Board.

Section 3. Other Committees and Task Forces. The Board of Directors may create and appoint members to such other committees and task forces as they shall deem appropriate. Such committees and task forces shall have the power and duties designated by the Board of Directors, and shall give advice and make non-binding recommendations to the Board.

Section 4. Term of Office. Each member of a committee shall serve for one year until the next annual meeting of the Board of Directors and until a successor is appointed, unless the committee is sooner dissolved.

Section 5. Vacancies. Vacancies in the membership of committees may be filled by the President of the Board.

Section 6. Rules. Each committee and task force may adopt rules for its meetings not inconsistent with these Bylaws or with any rules adopted by the Board of Directors.

ARTICLE VII MISCELLANEOUS PROVISIONS

Section 1. Fiscal Year. The fiscal year of the Corporation shall be the calendar year.

Section 2. Notice. Whenever under the provisions of these Bylaws notice is required to be given to a director, officer, or committee member, such notice shall be given in writing by first-class mail, overnight delivery service with postage prepaid or e-mail to such person at his or her address as it appears on the records of the Corporation. Such notice shall be deemed to have been given when deposited in the mail or the delivery service.

ARTICLE VIII INDEMNIFICATION

As set forth in the Articles of Incorporation, the Corporation shall indemnify any director or officer or any former director or officer, and may by resolution of the Board of Directors indemnify any employee, against any and all expenses and liabilities incurred by him or her in connection with any claim, action, suit, or proceeding to which he or she is made a party by reason of being a director, officer, or employee. However, there shall be no indemnification in relation to matters as to which he or she shall be adjudged

to be guilty of a criminal offense or liable to the Corporation for damages arising out of his or her own gross negligence in the performance of a duty to the Corporation.

Amounts paid in indemnification of expenses and liabilities may include, but shall not be limited to, counsel fees and other fees; costs and disbursements; and judgments, fines, and penalties against, and amounts paid in settlement by, such director, officer, or employee. The Corporation may advance expenses or, where appropriate, may itself undertake the defense of any director, officer, or employee. However, such director, officer, or employee shall repay such expenses if it should be ultimately determined that he or she is not entitled to indemnification under this Article.

ARTICLE IX AMENDMENTS TO BYLAWS

These Bylaws may be amended or new Bylaws adopted upon the affirmative vote of a majority of the Board of Directors at any regular or special meeting of the Board. The notice of the meeting shall set forth a summary of the proposed amendments.

Adopted unanimously by the Initial Officers of the Corporation, this _____ day of
_____ 2007.

_____, President

_____, Vice-President

_____, Secretary-Treasurer

Palisades Village

staying active | staying home | staying connected

LETTER OF AGREEMENT

Ms. XXXXXXXX
Street Address
Washington, DC 20007

Dear Ms. XXXXXXXX:

I am pleased to offer you the position as first Executive Director (ED) of Palisades Village effective [DATE], 2009. We believe that you have the qualities that will move Palisades Village into successful operation and look forward to working with you on this endeavor.

We have discussed the terms of this offer but in the interest of clarity, I would like to set them out once more. At the start, this is a part-time position with an initial salary of \$XX,XXX per year and is based on the assumption that the full-time salary would be \$XX,XXX. We expect that you will work approximately 30 hours per week and understand that the hours may be irregular depending on the needs of Palisades Village members. We also offer 12 days paid vacation annually and three days of sick leave, with each accruing monthly. We regret that we cannot offer health insurance, pension or other benefits. Vacation scheduling and other procedural matters will be worked out with the Board.

The Executive Director's duties are those on the attached copy of the job description. Your signature will acknowledge receipt. Priorities and general direction will be established by the Board, the overall goal being top quality service delivery to the members of Palisades Village and effective Board support. To insure that the parties are communicating effectively, we intend to schedule an informal performance review at the end of the first 90 days, and the first 180 days of your tenure and annually thereafter. Reviews can also be held at other times.

This agreement may be terminated by either party upon 30 days written notice with or without cause. In addition, the Board retains the right to terminate with less or no notice in case of malfeasance, discrimination or endangerment of Palisades Village members, volunteers or other staff.

Your signature will indicate acceptance of this offer. We hope to hear from you very soon.

Best wishes,

XXXXXXXXXXXXX
President, Palisades Village

Accepted:

_____ Date _____



Part of the Senior Service Network Supported by the D. C. Office on Aging

PO Box 40403, Washington DC 20016-0403

info@palisadesvillage.org | telephone (202) 244-3310 | www.palisadesvillage.org

Palisades Village Board of Directors: Andrew Mollison – President, Alicia Juarrero – VP, Mary Jo McPherson – Secretary/Treasurer
Anne Allen, Mary Baluss, Janet Bullinger, Douglas Ormerod, Judy Rosenfeld, Rachel Thompson

JOB DESCRIPTION: PALISADES VILLAGE EXECUTIVE DIRECTOR

The Palisades Village (PV) Executive Director will be a creative, high-energy problem-solver to manage all day-to-day activities of a new nonprofit membership organization. The ED will be responsible for helping to launch and maintain an organization that will provide services -- through volunteers, referrals and contracts -- necessary to extend the time that older residents of DC's Palisades and Foxhall neighborhoods can remain safely and happily in their own homes and community. PV is part of a movement that is spreading through the country to expand the choices of people who are aging and need some assistance but do not want to segregate themselves by age or income in assisted living or retirement villages. More information about PV can be found at www.palisadesvillage.org.

The primary mission of Palisades Village is member service. The person chosen for this position will be responsible for making sure that all established services are available to every member in a timely, friendly and efficient way, reacting to the particular needs of each member. The person will be responsible for volunteer and provider recruitment, supervision, evaluation and feedback, and developing new programs and services in partnership with the board.

The person will have experience in working effectively with volunteers, and with financial management. Initially, the executive director will be PV's only paid employee and will have to exercise initiative and good judgment in prioritizing efforts. Tact, diplomacy and a sense of humor will be useful skills. This position may be particularly attractive to a recent retiree.

The executive director will also interact with other service organizations in the area and public policy makers. The person will also be responsible for production of the PV newsletter, media releases and reports and must have strong writing and speaking skills.

The ED will track revenues and expenditures and ensure that activities remain within the PV budget, and assist the Treasurer in maintaining the appropriate financial records and filing all required reports. The ED will also support the Board of Directors in carrying out its responsibilities, such as fundraising, organizational planning and service/membership development, will prepare monthly reports and will attend all Board meetings.


Initials

_____ Executive Director

_____ President

SAMPLE OF VILLAGE SERVICES

(ED) is executive director or his/her assistant, (V) is volunteer, (R) is referral to an approved vendor or other professional.	
Home Maintenance	<ul style="list-style-type: none"> • Reaching high places and moving heavy objects: changing light bulbs and fire alarm batteries, moving furniture around, bringing things up and down stairs (V) • Making home safer: Repairs, railings, other adaptations (V/R) • Staying organized: Rearranging, de-cluttering, cleaning (V/R) • Waiting for repair person, helping to talk with the repair person (V) • Watering plants & picking up mail during a vacation (V) • Computer problem-solving, getting onto the internet (V)
Transportation	<ul style="list-style-type: none"> • Rides to the grocery store, local errands, appointments (V) • Packing, companionship on a long drive (V/R) • On as short notice as we can arrange it
Goodies (premiums)	<ul style="list-style-type: none"> • Discount coupons from local stores and restaurants • Free access to Consumer Checkbook custom-for-PV internet portal with only businesses that work in Palisades and Foxhall
Consumer & Finance	<ul style="list-style-type: none"> • Organizing and paying monthly bills (V/R) • Completing insurance forms, other paperwork (V/R) • Reviewing utility bills, eliminating or adding new phone/internet/cable TV services (V) • Contacting city agencies when a street light goes out or the trash hasn't been picked up (V) • Professional geriatric financial planning (R)
Meals and Groceries	<ul style="list-style-type: none"> • Weekly grocery shopping (V) • Home-delivered meals, elegant or casual (R) • Discount coupons from local restaurants and stores (ED)
Other concierge-type services (V)	<ul style="list-style-type: none"> • Pick up a prescription, dry cleaning • Pack boxes, mail a package • Pick up theatre and symphony tickets • Take in computer or car for repairs
Matchmaking (ED) and Excursions	<ul style="list-style-type: none"> • Putting people with similar interests in touch with one another • Daily walks, dining groups, going to the movies/theatre (ED) • Special excursions (ED)
Information (ED)	<ul style="list-style-type: none"> • Whatever the request, we'll work to find a solution • Services available at Iona House, Sibley Seniors Association, and area hospital-sponsored programs for seniors • Referrals to experts about nursing care, long-term care, with the right contacts • Information about Meals on Wheels, other dining programs • "About Town" information
Wellness & Medical	<ul style="list-style-type: none"> • Membership in area hospital programs that provide expedited care
Volunteer programs	<ul style="list-style-type: none"> • Opportunities for members to help each other (V)

 <p>BURNING TREE village in partnership with The Senior Connection</p>	<h2>Register for Services</h2>
--	--

BTV was organized to help neighbors remain in their homes (age in place) through provision of services by volunteers. There is no fee for these services. BTV has formed a partnership with The Senior Connection to register those requesting services and to match them with BTV volunteers as needed. If you have any questions, please contact Sue Dollins of the Senior Connection at 301-962-0820 or Leslie Kessler of BTV at 301-526-2251.

To request a specific service (e.g., transportation to a medical appointment on a particular day and at a particular time) or to update the form, call Burning Tree Village c/o The Senior Connection at 301-962-0820. Be sure to mention BTV when you call.

Mail the completed form to Burning Tree Village, c/o Amy Rider, 8404 Beech Tree Rd., Bethesda, MD 20817.

PERSONAL INFORMATION

Title	First Name	M.I.	Last Name	Date
Address			Bethesda, MD 20817	
Home Phone	Cell Phone	E-mail Address	Date of Birth	Gender (please circle) M F

EMERGENCY CONTACT

Name _____ Relationship _____
 Address _____
 Home Phone _____ Office Phone _____ Cell Phone _____
 Email _____

For Office Use Only ID# _____ Date Registration Received _____

OPTIONAL PERSONAL INFORMATION

These three questions are optional. They are asked so that we may demonstrate the diversity of our program and will have no impact on any aspect of the organization's activities.

Race/Ethnicity						
Marital Status (please circle)	Single	Married	Domestic Partnership	Widowed	Separated	Divorced

Religious Affiliation	
-----------------------	--

SPECIAL NEEDS

Please check all limitations that apply and add any additional information that would be helpful.

	Mobility <i>(check here and check an option below if relevant)</i>
	I use a cane
	I use a walker
	I use a wheelchair*
	Vision <i>(check here and check the option below if relevant)</i>
	I need help with reading or writing
	Hearing
	Speech
	Memory
	I use an oxygen tank
	English
	Other <i>(specify)</i>

* A service recipient must be ambulatory to receive transportation services.

SERVICES REQUESTED

Personal Visits	
	friendly visiting
	discussion (current events, politics, science, arts, etc.)
	reading letters, books, and magazines; writing letters and handling other correspondence
	computer and internet assistance
	paperwork assistance: medical claims and other forms
Telephone Contacts	
	telephone check-ins
	medication reminders/appointment reminders
Transportation	
	transportation to medical appointments
	transportation to shopping or other activities (hairstylist, bank, cultural or social engagements, etc.)
Chores	
	personal shopping – shopping for you by a volunteer, from a list you prepare
	companion shopping – a volunteer accompanying you on a shopping trip
	meal preparation
	snow and leaf removal
	light home chores (changing light bulbs or batteries, setting clocks, hanging pictures, etc.)
	pet care
	indoor plant care
	trash can and recycle bin take out and return
	simple mending (buttons, seams, etc.)
Other	
	caregiver relief
	language translation
	other <i>(specify)</i>

MEDICAL CONTACTS

If you expect to request transportation to medical appointments, please list the relevant offices below.

Physician/Provider Name	Office Address, including suite number	Office Phone	Specialty



GUIDELINES FOR USING SERVICES

1. Please call The Senior Connection office (301-962-0820) between the hours of 9:00 a.m. and 4:00 p.m. to reach a person. We do not answer the phone during lunchtime, so avoid the noon hour. Use the answering system if someone does not answer, since staff members may be tied up on other calls.
2. Juanita at The Senior Connection is your point of contact on behalf of Burning Tree Village.
3. If you do need to use the answering system, please leave your full name, number and reason for your call.
4. If calling for a service, please be prepared with the information you need to relay to the coordinator (for example, doctor's name, address, suite number, telephone number, and appointment time and date.)
5. It is important that you answer your phone or check for messages when services are pending so that we may reach you for any necessary follow-up communications.
6. If needing shopping assistance, please plan ahead, since we cannot shop for you more than once a week. Avoid making the volunteer lift large or heavy containers or extremely large orders of groceries. For such heavy orders, use Top Banana Home Delivered Groceries at 301-372-FOOD (3663) or Peapod by Giant at 1-800-5-PEAPOD (1-800-573-2763.) Have the list prepared so that the volunteer can read it easily. Be specific with size and brand. Inform the volunteer as to when it is okay to substitute and when it is not.
7. For grocery shopping, you may give the volunteer cash, check or a credit card. The volunteer will bring you a receipt along with your change if you paid with cash. If you wish to use a credit card, a release signed by you authorizing the shopper to sign on your behalf must be kept on file.

8. To the extent possible, please plan ahead so that you do not have to make last minute transportation requests. The more notice you give, the more likely it is that we will be able to arrange for a driver. Two weeks notice is optimal and requested, but if you need a ride with shorter notice, we will do our best to accommodate you. Burning Tree Village and The Senior Connection are not equipped to handle emergencies.
9. If needing transportation services, please try to schedule your appointment between the hours of 10:00 a.m. and 2:00 p.m. Volunteers do not like to drive during rush hour, so it is more difficult to find a volunteer driver outside of those times. We will attempt to meet requests for other times based on the availability of volunteers.
10. All services are performed by volunteers. The volunteer has been given a specific assignment during a specific period of time that they have agreed to do. Do not make last minute requests. These trips are scheduled for 1-2 hours and may generally include 1 extra stop. PLEASE DO NOT CALL THE VOLUNTEER DIRECTLY. Call the office with all requests for service.
11. Notify the office immediately if an appointment needs to be cancelled.
12. Parking fees are your responsibility. The volunteer is already being generous with their time and gas usage. If the round trip exceeds 15 miles, you may be asked to pay for the gas used.
13. If you have one, a handicapped sticker will enable the volunteer to assist you to the door or office. Ask your doctor to authorize the necessary paperwork to the Motor Vehicle Administration. You do not need to own a car to qualify.
14. Burning Tree Village and The Senior Connection must have permission to talk to a family member in case of emergency.

Appendix B: Volunteer Information

Elements of Volunteer Program Management	3
Volunteer Management Software Links	5
Volunteer Job Description	6
Volunteer Registration Form	7
Burning Tree Village & Senior Connection	
Information & Guidelines for Volunteers	10
Burning Tree Village & Senior Connection	
Code of Ethics	
General Guidelines	
Friendly Visiting Guidelines	
Personal Shopping Guidelines	
Transportation Guidelines	
Reducing Risk	
Guidelines for Emergencies	
Insurance, Confidentiality and Gifts	
Working with Older Persons	
Red Flags Observations and Opportunities	18
Montgomery County Mental Health Assoc.	
Volunteer Rights and Responsibilities	21
Volunteer Connections of Greater Winston-Salem	

Elements of Volunteer Program Management

Create a plan for the volunteer program

- Conduct regular needs assessments
- Stay current on the trends in volunteering
- Assess volunteer positions on a regular basis
- Write position descriptions for all volunteer duties
- Build a team of staff and volunteers to guide the program

Recruit and Place Volunteers

- Plan a recruitment strategy
- Organize a volunteer recruitment team
- Create a screening process for volunteers
- Place volunteers in appropriate positions

Orient and Train Volunteers

- Determine the needs of volunteers related to their position
- Determine the needs of the organization related to the volunteer positions
- Write learning objectives to address the needs
- Organize orientation training for volunteers
- Organize in-service training for volunteers

Supervise and Recognize Volunteers

- Organize supervision and management activities to support the work of the volunteers
- Understand the internal and external motivators for volunteers
- Assist staff in understanding the techniques to work effectively with volunteers
- Develop a recognition plan
- Implement the recognition plan

Evaluate the Volunteer Program

- Develop a plan to evaluate all aspects of the volunteer program
- Use known standards to assess the program
- Use the results of the evaluation in planning the volunteer program for the next year

Rights and Responsibilities for Volunteers

A volunteer is entitled to:

- Training that prepares them for their volunteer duties
- A clear description of what they are volunteering to do
- A time frame for their job that respects their schedules
- Clear guidelines of prohibited practices as a volunteer
- A person or persons who will be available for support and will hear their grievances and who is able to provide sound guidance
- Clients who are knowledgeable about what their volunteer can and cannot do
- Proper recognition for their volunteer efforts

A volunteer is responsible for:

- Attending mandatory training
- Arriving punctually for their volunteer assignment
- Abiding by all policies and procedures as defined by the organization
- Notifying volunteer coordinator when/if they cannot meet their task
- Treating their clients with complete respect
- Keeping information about their clients confidentially unless given permission by the clients to share
- Filing whatever paperwork is required by the organizations
- Attending meetings that may be called by the organization regarding volunteer efforts

Online Resources

ServiceLeader.org: Go to "For volunteer managers/implementing a Volunteer Program"

Energizeinc.com: Good clearinghouse for valuable information

Managementhelp.org: Library "Developing and Managing Volunteer Programs"

Also: **The Montgomery County Volunteer Center** has resource that can be viewed in their offices. Call 240-777-2600.

Volunteer Management Software

Many of these have online demos and free-trials



- [Blackbaud](#) makes a variety of products that include volunteer management components (although the company rarely uses the word "volunteer" in describing their products)
 - www.blackbaud.com
- [CERVIS](#) (Community Event Registration and Volunteer Management System)
 - www.cervistech.com
- [CiviCore Volunteer Management](#)
 - www.civicore.com
- [CiviCRM](#), open source and freely downloadable
 - www.civCRM.org
- [OrgAction Online Volunteer Database](#)
 - www.orgaction.com
- [ROVIR, the Retriever of Volunteer Information and Reporting](#)
 - www.rovirinfo.com
- [Samaritan Technologies](#) (eCoordinator)
 - www.samaritan.com
- [Son of Service \(SOS\)](#) (free)
 - www.sos.sourceforge.net
- [TechSoup.org](#) (IT organization with great resources for discounted software and some hardware)
 - www.TechSoup.org
- [Tools for Organizations/Habitat Scheduling](#)
 - www.toolsfororganizations.com/habitat/scheduling.php
- [V2/Volunteer2/Volunteer Squared/Volunteer Impact](#)
 - www.volunteer2.com
- [Volgistics](#), Red Ridge Software
 - www.volgistics.com
- [Volunteer Event Management \(VEM\)](#) from Volunteer Solutions
 - www.volunteersolutions.org/products/vems
- [Volunteer Spot](#)
 - www.volunteerspot.com
- [Volunteer Reporter](#) (formerly RSVP Reporter)
 - www.volsoft.com
- [VSys One](#)
 - www.vsysone.com
- [When to Help](#)
 - www.whentohelp.com

VOLUNTEER JOB DESCRIPTION

- 1) Title of Job
- 2) Job Description: responsibilities, time commitment, where
- 3) Volunteer Qualifications Required
- 4) Required Training
- 5) Contact Person

A hypothetical job description might look like this:

- 1) **Title of Job:** Volunteer Grocery Shopper
- 2) **Job Description:** The "VGS" is responsible for shopping weekly for one community member in need of such help. This will involve helping the client with making the list, taking any coupons or discounts the client is entitled to, and then getting the groceries, bringing them in the house and assist in putting them away. It is anticipated this will require 3 hours a week, including travel time. Attempts will be made to assign the volunteers to clients as near to their homes as possible.
- 3) **Qualifications:** Volunteers must have reliable cars and be able to carry grocery bags. Volunteers must also be finger-printed to assure the safety of the clients.
- 4) **Required Training:** This is where the organization will provide what their standards are, such as a 2-hour session; group or one-to-one; etc. and also what follow-up will be done once the volunteer is placed.
- 5) **Contact Person:** This would be the person who is charged with volunteer recruitment or any other person designated to field these calls.

 <p>BURNING TREE village</p> <p>in partnership with</p>  <p>The Senior Connection</p>	<p>Sign Up to Volunteer</p>
--	--

BTV was organized to help neighbors remain in their homes (age in place) through provision of services by volunteers. There is no fee to recipients for these services. If you choose to volunteer with BTV, please complete this form. Note that the information will be kept confidential and will be used only for volunteer assignments, statistical reports, or in the case of an emergency.

BTV is partnering with The Senior Connection for coordination of volunteers. If you have any questions please contact Ms. Sue Dollins of The Senior Connection at 301-962-0820 or Leslie Kessler of BTV at 301-526-2251.

Mail the completed form to Burning Tree Village, c/o Amy Rider, 8404 Beech Tree Rd., Bethesda, MD 20817

PERSONAL INFORMATION

Title	First Name	M.I.	Last Name	Date				
Address			Bethesda, MD 20817					
Home Phone	Cell Phone	E-mail Address	Date of Birth	Gender (please circle) M F				
Occupation (if retired, please state that and report last occupation)			Language abilities (please specify languages, including sign language)					
Emergency Contact	<table border="0" style="width: 100%;"> <tr> <td>Name of Contact Person</td> <td>Home Phone</td> <td>Work Phone</td> <td>Cell Phone</td> </tr> </table>				Name of Contact Person	Home Phone	Work Phone	Cell Phone
Name of Contact Person	Home Phone	Work Phone	Cell Phone					
Auto Insurance (for drivers)	<table border="0" style="width: 100%;"> <tr> <td>Auto Insurance Company</td> <td>Policy Number</td> <td>Expiration Date</td> </tr> </table>				Auto Insurance Company	Policy Number	Expiration Date	
Auto Insurance Company	Policy Number	Expiration Date						

OPTIONAL PERSONAL INFORMATION

These three questions are optional. They are asked so that we may demonstrate the diversity of our program and will have no impact on any aspect of the organization's activities.

Race/Ethnicity	
Marital Status (please circle)	Single Married Domestic Partnership Widowed Separated Divorced
Religious Affiliation	

SERVICES YOU ARE WILLING TO PROVIDE

Please mark all areas of interest to you

Direct Assistance to Neighbors	
Personal Visits	
	friendly visiting
	discussion (current events, politics, science, arts, etc.)
	reading letters, books and magazines; writing letters and handling other correspondence
	computer and internet assistance
	paperwork assistance: medical claims and other forms
Telephone Contacts	
	telephone check-ins
	medication reminders/appointment reminders
Transportation	
	transportation to medical appointments
	transportation to shopping or other activities (hairstylist, bank, cultural or social engagements, etc.)
	meal delivery
Chores	
	personal shopping - shopping from a list prepared by a homebound neighbor
	companion shopper
	meal preparation
	snow and leaf removal
	light home chores (changing light bulbs and batteries, setting clocks, hanging pictures, etc.)
	pet care
	indoor plant care
	trash can and recycling bin take out and return
	simple mending clothing (buttons, seams, etc.)
Other	
	caregiver relief
	language translation
	other (<i>please specify</i>)
Support Services for BTV	
	administrative/clerical/data entry
	telephone support
	website development and maintenance
	language translation of forms and flyers
	other (<i>please specify</i>)
Policy Guidance and Community Relations for BTV	
	serving on the community and public relations advisory committee
	serving on the development and fundraising advisory committee
	serving on the program planning and evaluation advisory committee
	serving on the Board of Directors

	other (please specify)
--	------------------------

TIME AVAILABILITY

PREFERRED FREQUENCY	
Scheduled Friendly Visits: (please circle)	WEEKLY TWICE WEEKLY OTHER _____
Other Services: (please circle)	
WEEKLY TWICE WEEKLY BI-WEEKLY AS NEEDED MONTHLY ON CALL	
Time Constraints: (please indicate months, days, and/or times you are not available)	

Please mark all days and times you prefer to volunteer. There is no minimum time commitment													
	8am	9am	10am	11am	Noon	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm
Sun													
Mon													
Tue													
Wed													
Thu													
Fri													
Sat													

REFERENCES

Please provide three personal references (non-relatives).

1. Name: _____ Relationship _____
Address: _____ Street City State Zip Code
Daytime Telephone _____ Evening Telephone _____ Email _____

2. Name: _____ Relationship: _____
Address: _____ Street City State Zip Code
Daytime Telephone _____ Evening Telephone _____ Email _____

3. Name: _____ Relationship: _____
Address: _____ Street City State Zip Code
Daytime Telephone _____ Evening Telephone _____ Email _____

I hereby grant permission for an agent of BTV or The Senior Connection to check with these three references.

Signature: _____ Date: _____

For office use: Reference Check Date (1) _____ (2) _____ (3) _____ Start Date _____ Entry Date _____

Burning Tree Village, Inc.

in partnership with



The Senior Connection

INFORMATION AND GUIDELINES FOR VOLUNTEERS

Updated
September, 2008

CODE OF ETHICS FOR VOLUNTEERS

As a volunteer, I realize that I am subject to the same code of ethics that binds professionals in the field. I shall assume my volunteer responsibilities and be accountable for what I do. I will respect the confidentiality of the matters in which I am involved. I understand **volunteer** to mean that I have agreed to work without compensation in money. I expect to follow through with the commitments I have made, to take to my work an attitude of open mindedness, to be willing to be trained for the work, and to give it my full interest and attention.

GENERAL GUIDELINES

1. Background information about your service recipient will be given to you before you are introduced to him/her. Be sure to keep all information confidential.
2. Volunteer in the areas you have agreed to cover. If you want to expand your role, please let us know!
3. Be sure to confirm your visiting time with your service recipient before going to his/her house. A phone call arranging the time is also an opportunity for a chat that the service recipient will appreciate.
4. Ask the service recipient if he/she has any needs. For instance, ask if he/she needs assistance in walking. Does he/she need to hold your arm for support? Is the service recipient able to see clearly see signs? Do not assume you know his/her needs.
5. If you are providing transportation, you must carry a valid driver's license, have automobile insurance and a good driving record.
6. Report any changes in your service recipient's mental or physical health to Burning Tree Village or The Senior Connection office (301-962-0820).
7. If your personal situation changes, and you cannot keep your appointments, let the office at The Senior Connection know with as much advance notice as possible so that alternate arrangements can be made to provide those services.
8. We recommend that you not give your telephone number to your service recipient. This will lessen the chances of a dependency relationship developing.
9. Do not offer any medical advice.
10. In an emergency, call 911. Do not offer to take the service recipient to the hospital. See Guidelines for Emergencies in this packet.
11. Refrain from entering a home when no one answers the door. Try calling the service recipient first. If no answer, call The Senior Connection for guidance. Call the local police if you suspect that there is a problem.

FRIENDLY VISITING GUIDELINES

1. **BE CHEERFUL AND FRIENDLY.** Prepare yourself to be cheerful and friendly. It will be remembered and appreciated.
2. **BE A GOOD LISTENER.** As a rule, older people want to talk to someone who is a good listener. Be patient, as you will likely hear repetitions of what you have already heard. Encourage your service recipient to talk. It is good therapy.
3. **BE CAREFUL.** Do not take sides in personal problems. Be a good listener, remain friendly and do not take sides.
4. **BE REGULAR.** Let the person know when you are coming again. This will give him/her something to look forward to. If you cannot make a promised visit, be sure to let the service recipient know in time.
5. **ENCOURAGE** the service recipient to do something for others. Suggest things within his/her capabilities. Concern for others often supplants concern with oneself.
6. **MAINTAIN INTEREST AND ENTHUSIASM.** Realize that you have an opportunity to bring contact with the outside world. Discuss current affairs or other subjects the service recipient may find interesting.

PERSONAL SHOPPING GUIDELINES

1. Set a specific day for shopping. Call your service recipient the day before the shopping date to confirm plans. You may also call again before you leave your house on the appointment day if that makes the service recipient feel more comfortable.
2. Do not give your home telephone number or say that you are “on call” as needed. This may lead to the service recipient calling you more often than you wish, or becoming overly dependent on you.
3. Make it clear that you will only shop at one store; two at the most if you must also go to a pharmacy. If you want to do other errands, you may do so at your discretion; but the program works better if the number of errands is limited.
4. Be sure that the service recipient makes a shopping list for you that includes brand names and sizes. Review the list thoroughly, anticipate problems, and ask questions before you leave for the store.
5. Ask your service recipient what to do if the preferred item is not in stock. Should you buy another brand or omit that item from the list? Expect to make an occasional mistake, and do not worry about it if you have done your best.
6. Find out if economy is important. If you notice a less expensive brand than the one specified, check to see if your service recipient wants you to buy it instead.
7. If the person has developed an indifference to food and good nutrition, diplomatically suggest ideas and menus that incorporate tasty and nutritious foods.

8. For your protection, it is wise to write and sign a receipt for cash, banking cards, checks or food stamps received from the service recipient prior to leaving for shopping. Upon your return, give the service recipient the store receipt and any change due them. Note the amount of the purchase and the change on the receipt for the service recipient. If the service recipient wishes to give you a credit card to use, please have him or her sign the Credit Card Authorization form to keep on file.
9. When you return from shopping, you may assist with unpacking and storing purchases if the service recipient indicates that some help would be appreciated.
10. Your visit with the service recipient is as important as shopping. If time permits, plan to spend a short time chatting.
11. Verify the shopping date for the next week before leaving the service recipient's home.

TRANSPORTATION GUIDELINES

The Transportation Coordinator for The Senior Connection will give you your transportation assignment. This will include the service recipient's name, address, telephone number, and any special health or mobility concerns, along with the date, time, and address of the person with whom the appointment is scheduled. After receiving this information, you should follow the guidelines listed below.

1. Telephone the person the day before their scheduled appointment. Identify yourself and confirm the appointment and the time you will pick them up.
2. It is best to call again the morning of the appointment just as a reminder and to verify that the appointment has not been cancelled. Identify yourself again and your vehicle.
3. Call for the person at their door and identify yourself. Be ready to assist them.
4. Make sure to allow enough time to arrive at your destination on time. You should allow an extra 15-30 minutes for bad weather, traffic problems, or when the service recipient has physical challenges.
5. When you arrive at the appointment location, identify yourself to the Receptionist as the Volunteer Driver for Burning Tree Village.
6. If the appointment is not too long (based on your judgment), please wait. If the appointment is long, you may make arrangements with your service recipient to come back at an agreed-upon time for the return trip home.
7. Return for the service recipient as agreed. If they request a stop on the way home (for example, a stop at the pharmacy or grocery store), and it is convenient, you may make the additional stop. If it is inconvenient to make an additional stop, do not hesitate to say you will not be able to make the stop.
8. If you wish to drive the service recipient for their next appointment, please notify the office. However, the service recipient must schedule the appointment through The Senior Connection office.

9. Always use your seat belt before starting your car. Make sure the service recipient also has his or her seat belt fastened. Please assist them if necessary.
10. The Transportation Coordinator does not give the service recipient your telephone number. It is highly recommended that you do not give your telephone number to the service recipient. Transportation should be arranged through The Senior Connection office. If you do receive a call from the service recipient because they have Caller ID, ask them to call the office to arrange transportation. Please report such calls to the office.
11. If you are unable to keep an appointment, please call the office as soon as possible or leave a message on the answering machine.
12. Do not smoke in your car while the service recipient is with you, or before you pick them up.
13. Do not play your car radio while the service recipient is with you unless soft background music is requested. Conversation is encouraged.
14. Do not use your cell phone while driving.
15. DRIVE SAFELY!

REDUCING RISK ON VOLUNTEER ASSIGNMENTS

In order to reduce risk, volunteers should follow these ethical and legal guidelines:

1. Attend orientation provided by The Senior Connection on behalf of Burning Tree Village.
2. Act responsibly and show commitment to your volunteer assignment by following all the practices, guidelines and suggestions provided to you during your orientation and in ongoing training sessions.
3. Always exercise caution and common sense when providing your services.
4. Develop a positive and open relationship with the service recipient.
5. Submit accurate records and reports on your completed tasks, ongoing services, and hours completed.
6. Maintain trust and confidentiality. Keep the service recipient's personal matters in confidence except in case of danger or emergency. In these cases, your **contact person at The Senior Connection must be notified.**
7. Accept a confidence carefully and honestly. Inform the service recipient beforehand that you may have to reveal this information if it involves potential risk or danger.
8. Respect the spiritual and religious practices of the service recipient. Avoid discussions of religion or religious practices.

9. Report any suspicion of service recipient abuse. If you suspect any abuse—physical, emotional, sexual or financial, **YOU MUST** report it immediately to your contact person.
10. Do not perform “hands on” or personal services such as bathing, toileting, massage etc. for your service recipient.
11. Do not offer medical advice. This includes advice about medications or over-the-counter medical products.
12. Do not expose the service recipient to any contagious diseases. If you develop a cold, flu etc, or become exposed to a communicable disease such as chickenpox or tuberculosis, notify your contact person immediately so that alternative arrangements can be made.
13. Do not cash checks or sign any legal documents with or for the service recipient.
14. Do not accept money or gifts of value. Suggest a donation to Burning Tree Village or The Senior Connection if the service recipient or the family wishes to show support and appreciation.

GUIDELINES FOR EMERGENCIES

If an emergency occurs when you are on an assignment, it is important that you remain calm. Focus on helping the person in need and on notifying the proper authorities that can render assistance.

When a service recipient does not answer the door:

1. Check the premises; look through the window, or call on the telephone.
2. If there is still no response, call The Senior Connection office to report the situation.

When the service recipient has an accident:

1. If the person is unconscious, do not move him/her except in a hazardous situation such as a fire. Call 911 immediately for emergency assistance.
2. If the person is conscious, do not move him/her except in a hazardous situation. Call 911 immediately for emergency assistance.
3. Call the Senior Connection or your volunteer coordinator to report the situation.

Do not attempt to handle an emergency situation on your own.

INSURANCE, CONFIDENTIALITY AND GIFTS

Insurance Coverage

“Good Samaritan Laws” apply to volunteers.

1. Applies to risks not otherwise insured.
2. Volunteers associated with The Senior Connection are covered under the liability policy for \$1,000,000. This policy also covers the excess of automobile insurance claims beyond the volunteer’s insurance.
3. Intentional acts, criminal behavior or gross negligence are not covered.

Payment for Services

1. Acceptance of money in exchange for volunteer services negates one’s volunteer status under our insurance policy. Therefore, volunteers cannot accept money, gifts or other items of value
2. If a service recipient insists on giving money to a volunteer, he/she should forward the gift to Burning Tree Village in the name of the service recipient. Burning Tree Village will acknowledge receipt of the gift to the service recipient.
3. The volunteer may accept nominal presents such as minor items of food, beverages, snacks or handmade items.
4. If a service recipient is incompetent, demented, or otherwise incapable of making decisions for himself or herself, the volunteer may not accept **any gift** (for yourself or for Burning Tree Village) without first gaining the approval of the service recipient’s family or legal guardian. Note: An incompetent person may not legally give a gift.

Tax Issues for Volunteers

1. Gifts of your time or personal services are not tax deductible.
2. Gifts of personal property, money, stocks, bonds and other cash equivalents are tax deductible.
3. Expenses incurred while conducting charitable activities are deductible, in accordance with accepted business practices and/or governmental rates.

GUIDELINES FOR WORKING WITH OLDER PERSONS

1. Be generous with your TOUCH (for example on the hand, arm or shoulder) if it seems welcomed by the service recipient—it may be the only touch that person will get that day. This does not include such personal services as bathing, toileting or massage.
2. Listen intently and be empathetic.
3. Share of yourself. If the service recipient is interested, describe your world to him/her.
4. Be dependable and be prepared to help.

5. Be straightforward and honest at all times.
6. Do not try to “fix” situations beyond your expertise or control.
7. **For the visually impaired:** Offer your arm for support and guidance. Identify steps or obstacles in the way. Avoid glare and poorly lighted areas. Communicate your willingness to help.
8. **For the hearing impaired:** Face the person when speaking. Face the light. Lower the pitch of your voice, and speak clearly. If there is a need to clarify, rephrase what you said earlier. Do not over-articulate. Stand or sit between three and six feet from the person.
9. **For the mobility impaired:** Move slowly and deliberately. Ask how you can best assist the service recipient to get in and out of a chair or the car. Avoid sudden changes in motion, pace or direction. Stroke patients may be slow and unsteady. If the person is paralyzed on one side, assist him/her on the feeling side. Always be patient, and communicate your desire to help.
10. **For the Breathing Impaired:** Limit physical activity, such as climbing stairs or walking long distances. Avoid open windows, fumes and smoking.
11. Always allow sufficient time. It is difficult for older people to rush or to be under pressure if time is limited. Allow extra time in bad weather to ensure the safety and comfort of the service recipient.
12. Be the eyes and ears for Burning Tree Village. Report any unmet needs to a Burning Tree Village officer. We are in touch with friends and relatives of the service recipient and have access to social service agencies. We can alert the appropriate party if there is a need for any action.
13. Be cheerful. Let the service recipient know, by your actions, that there are people and an organization here that care and are ready and willing to help.

Red Flags Observations and Opportunities

The following information is designed to help you make an informed decision about referring a person for help. Trust your intuition and know that your compassion and effort may prevent the premature or unnecessary institutionalization of an elderly person. Remember that most problems don't happen overnight – they usually have a slow progression that can be missed even by persons closest to the individual. An individual's uncharacteristic behavior, unkempt appearance and bizarre expressions often reveal underlying problems. In the elderly population, extreme anger, hostility and agitation could indicate emotional, mental or physical ailments. Marked personality changes are not a normal part of aging and are likely to be indicative of a problem. Most people experience a mental or emotional problem for the first time after 60 years of age, and it is the 60+ age group that commits suicide at a higher rate than any other group.

The following are areas to observe that may provide you with “red flags”, or indicators that an older adult is in need of help. These indicators will serve as useful information when you are making a referral.

General red flags:

Unjustified fear
Unreasonable excuses
Unwarranted suspicion
Unwillingness to talk
Tearfulness
Agitation or irritability
Inability to concentrate
Neglect of self-care
Stopping usual routines
Mood swings

Unexplained injuries
Refusal to have visitors
Multiple medications
Isolation or withdrawal
Multiple complaints
Burdensome guilt/shame
Neglect of duties
Feelings of worthlessness
Recent losses

Indicators of failing mental or emotional health:

Confusion	Alcohol or drug abuse
Disorientation	Change in functioning
Inappropriate dress	Irrational beliefs
Forgetfulness	Intense anger or irritability
Repetitiveness	Appears nervous or fidgety
Over-medication	Recent or multiple losses
Increased withdrawal	Difficult to console
Disheveled appearance	Change in appetite
Bizarre behavior	Suicidal ideation
Difficulty sleeping	
Paranoia	

Indicators of social isolation:

Homebound
Lack of social relationships
No mention of family or friends
Consistent refusal to participate in activities outside of the home
Physical or verbal “barricades” against outsiders

Changes in physical health:

Severe illness	Inability to move easily
Chronic disease changes	Loss of bladder or bowel control
Loss of hearing or vision	Complaints of pain or malaise
New or multiple prescriptions	

Neglect in self-care:

Unkempt appearance	Inappropriate clothing
Dirty / uncombed hair	Body odor
Unshaven	Trash around the home
Dirty clothes	Little food in the home

Neglect of environment:

Clutter everywhere
Strong odors
Disrepair
Garbage left out

Dirty surfaces
Utilities cut off
Neglected animals

Economic hardship:

Inability to manage finances
Loss of financial support

Increased medical expenses
Low income

Suicidal thoughts or expressions:
--

Recent or multiple losses
Alcohol or drug abuse
Increased depression
Increased isolation

Sudden happiness
Giving away possessions
Putting affairs in order
Despairing statements

“There’s no use.” “I’m no good to anyone.” “I’d rather be dead.” “I’m just a burden.” “Why go on like this?”....

Follow up on such comments and ask if the person has a plan and the means to carry out the plan. If “yes” is the answer, the person is at very high risk.

Take their comments VERY seriously and call a local help-line for guidance and assistance.

You may start with First Call for Help at _____ hours a day).

For non-emergency referrals for older adults, call Answers for the Aging at

**.
The Mental Health Association of Maryland is another good resource for information, 410-235-1178, ask for the coordinator of aging programs.**

GO TO: www.mdaging.org

For education including fact sheets on issues of mental health and aging

Volunteer Rights and Responsibilities

Volunteer Connections of Greater Winston-Salem believes that volunteers have the following rights and responsibilities.

It is your right:

- To find opportunities for meaningful volunteer work that best match your skills and interests, when possible;
- To receive the orientation, training, and supervision necessary to do the work;
- To be treated with respect and as a valued co-worker;
- To have safe, healthy working conditions;
- To be asked for permission before any references or background checks are performed;
- To be kept informed of relevant matters within the organization that may impact your work;
- To receive feedback on the work you perform;
- To be given the opportunity to provide feedback and input;
- To expect that your time will be used effectively.

It is your responsibility:

- To be honest about your background, skills, goals, limitations and motivations;
- To meet time commitments or provide notice in accordance with the policies of the organization so alternative arrangements can be made;
- To accept the guidance and decisions of the volunteer coordinator or staff member that you report to;
- To perform the work assigned to you to the best of your ability;
- To maintain confidentiality;
- To follow organizational policies and procedures;
- To use any resources provided by the organization solely for the purposes of accomplishing your volunteer work, not for personal use or the use of others;
- To notify the organization if you choose to terminate your volunteer relationship with it.

Appendix C: Listing of Resources

Village Models Across the Nation	3
How to Start a Nonprofit Organization	5
Listing of Resources in Montgomery County	7
Care Management/Caregiver Support	
Consumer Information/Protection	
Education	
Employment	
Financial Services	
Counseling/Support Groups	
Companions/Helpers/Visitors	
Remodeling/Renovation/Modification	
Legal Services	
Grocer Shopping Services	
Transportation	
Forming a Non-profit	
Miscellaneous Information	10
Listing of Legal Resources in Maryland	12

Village Models across the Nation

California

Avenidas Village-\$800/yr individual
Hired Program Director and Manager
www.avenidas.org/village

Colorado

**Washington Park Cares - \$100/yr singles and \$200/yr households
Provides volunteer and other vetted service providers, a one-stop shop in terms of rides, errands, groceries, meals and home repair.
www.washingtonparkcares.net

Connecticut

East Rock Village – will start in 2010 - \$1,000 per household. Will offer subsidies if cannot afford fee.
Plans to hire a full-time Executive Director
Questionnaire on website.
www.eastrockvillage.org

Staying Put in New Cannan-\$360/yr individual, \$480/yr couple
www.stayingputnc.org

DC

Capital Hill Village - \$530/yr individual
www.capitalhillvillage.org

DuPont Circle - \$450/yr individual, \$600/yr household
www.dupontcirclevillage.org

**Kalorama Village, Inc.-\$50 initial annual membership dues, \$75 for families
Early stages of development, partnered with SeniorChecked in Bethesda and IONA senior services.
Survey on website
www.kaloramavillag.org

Northwest Neighbors Village- \$500/yr individuals, \$750/yr households
www.nwnv.org

Palisades Village-\$500/yr individual and \$750/yr household
Lower fees for households with income below \$50,000
www.palisadesvillage.org

Florida

**Coral Gables at Home-\$100/yr individual
www.gablesfoundation.org

Illinois

Lincoln Park Village

Will start late spring 2009

History in About Our Village

www.lincolnparkvillage.org

Indiana

60-Plus Club-\$125/yr individual, \$250 household

www.60-plusclub.org

Maryland

Home Ports Inc.- \$300 annually per household

www.homeports.org

Massachusetts

Cambridge At Home-\$900/yr individual, \$1,200 couples

www.cambridgeathome.org

Newton at Home – launch fall 2009, survey available on website

Tips and Tricks section for Starting a Village

www.newtonathome.org

Vineyard Village - \$750/individual, \$1,000 household

www.vineyardvillage.org

****New Jersey**

Community Without Walls, Inc.- \$15-30/yr individual

Provides start-up information

Provides a Fact Sheet

Organization Section

princetonol.com/groups/cww

New York

Gramatan Village-\$360/yr individual, \$480/yr household

www.gramatanvillage.org

Pennsylvania

Penns Village-\$500/yr individual, \$750/household

Provides meal preparation and delivery

SNaP-\$200/yr individual, \$250/yr household, \$150/yr supported member

By-laws, Budget, Annual Report, Tax Return, IRS letter on website

www.snapn.org

****Low Membership Fee**

How to Start a Nonprofit Organization

Tips on starting a nonprofit for organizations based in D.C., Maryland and Virginia

IRS Web site: www.irs.gov

Federal & Local Registration Internal Revenue Service - 800/829-1040 Ask for the following publications:

- Form 1023 Tax Exempt Application
- Form SS-4 Receive an Employer Identification Number
- Form 2848 Power of Attorney Form
- Form 8718 User Fee for Exempt Organizations Application
- Publication 557 Booklet of IRS Laws that Effect Nonprofit Organizations
- Form 990/990EZ Annual IRS Form for Tax-Exempt Organizations

Non-profits in the District of Columbia also require a Basic Business License. For more information on acquiring a Basic Business License from the Department of Consumer and Regulatory Affairs, go to <http://mblr.dc.gov/>.

Books on the Subject:

The Paper Chase: Nonprofit Filings, Forms & Record Keeping. By Peter Wolk, Esq. Published by the Cultural Alliance of Greater Washington and the Washington Area Lawyers for the Arts. Written specifically for Washington metropolitan 501(c)3 organizations. Available through the Center. Call 202.457.0540. The Center/CAGW/WALA members \$18; non-members \$21.

Ten Basic Responsibilities of Nonprofit Boards. By Richard T. Ingram, President, Association of Governing Boards of Universities and Colleges. 24 pages. Published by BoardSource. Call 800.883.6262. BoardSource members \$9; non-members \$12.

What A Difference Understanding Makes: Guides to Nonprofit Management Contains five booklets:

- Classifying 501(c) Nonprofits,
- Filing Nonprofit Tax Forms,
- Making Public Disclosures,
- Selecting Computer Software and
- Tracking Special Monies.

Published by the Accountants for the Public Interest

University of Baltimore

Thummel Business Center

1420 North Charles Street, Room 155

Baltimore, MD 21201

410.837.6533

FAX 410.837.6532

\$20 for API members. \$25 for non-members plus \$2.95 postage and handling.

Suggested Web Pages

- BoardSource- www.boardsource.org
- The Foundation Center - www.fdncenter.org
- The Nonprofit FAQ (Idealist) - www.nonprofits.org
- Compasspoint Nonprofit Services - www.compasspoint.org

Local Resources

Accountants for the Public Interest

University of Baltimore

Thummel Business Center, Room 155

1420 North Charles Street

Baltimore, MD 21201

410.837.6533

FAX 410.837.6532

Association of Fundraising Professionals - Washington

DC Metro Area chapter

www.afpdc.org

8201 Greensboro Dr., 3rd Floor

McLean, VA 22102

703.610.9023

***Center for Nonprofit Advancement**

www.nonprofitadvancement.org

1666 K St., NW, Suite 440

Washington, DC 20006

202.457.0540

FAX 202.457.0549

Council of Latino Agencies/Consejo de Agencias Latinas

www.consejo.org
2437 15th Street, NW
Washington, DC 20009
202.328.9451
FAX 202.667.6135

Cultural Alliance of Greater Washington

www.cultural-alliance.org
1436 U Street, NW #103
Washington, DC 20009-3997
202.638.2406

The Foundation Center

fdncenter.org/washington/
1627 K Street NW, 3rd Floor
Washington, DC 20006
202.331.1401

Independent Sector

www.independentsector.org
1200 18th Street, NW #200
Washington, DC 20036
202.223.8100

BoardSource

www.boardsource.org
1828 L Street, NW, Suite 900
Washington, DC 20036
202.452.6262

National Center for Nonprofit Law

1735 20th Street, NW
Washington, DC 20009
202.462.1000

Nonprofit Risk Management Center

www.nonprofitrisk.org
1130 17th St., NW, Suite 210
Washington, DC 20036
202.785.3891

Public Relations Society of America - National Capital Chapter

www.prsa-ncc.org
10366 Democracy Lane, Suite B
Fairfax, VA 22030
703.691.9212

Social Action and Leadership School for Activists (SALSA)

www.hotsalsa.org
1112 16th Street, NW #600
Washington, DC 20036
202.234.9382

Washington Area Lawyers for the Arts

www.thewala.org
901 New York Ave NW, Suite P1
Washington, DC, 20001
202.289.4440

**This tip sheet was produced by the Center for Nonprofit Advancement, 1666 K Street, NW, #440, Washington, DC 20006, 202.457.0540; fax 202.457.0549. The Center, founded in 1979, is a membership organization for nonprofits in the Washington, D.C. Metropolitan area. We provide information, educational opportunities, advocacy/community building activities, and group buying programs. Organizations with pending and granted 501(c) status are eligible to join the Center. For more information, contact us at www.nonprofitadvancement.org or 202.457.0540.*

Montgomery County Village Blueprint Listing of Resources

Bethesda Chevy Chase Service Center: 240-777-8200

Montgomery County Volunteer Center: 240-777-2600

Retired and Senior Volunteer Program (RSVP): 240-777-2610

Service Corps of Retired Executives (SCORE): 202-205-6762

Care Management/Caregiver Support

- Montgomery County Senior Info Line: 240-777-3000
- Montgomery County Aging & Disability Information & Assessment Unit:
240-777-3000
- Alzheimer's Referral Center: 800-438-4380
- Aging Network Services: 301-657-4329
- Montgomery County Seniors' Resource Guide:
www.thebeaconnewspapers.com/resource-guide
- Easter Seals Greater Washington: 301-588-8700

Consumer Information/Protection

- AARP Maryland: 866-542-8163
- Area Agency on Aging: 240-777-3000
- Catholic Community Services: 301-942-1790
- Commission on Aging: 240-777-1120
- Commission on People with Disabilities: 240-777-1120
- Community Action Partnership: 301-565-7460
- Rockville Senior Citizen Commission: 240-314-8810
- Division of Consumer Affairs: 240-777-3636
- Consumer Protection Division, Health Hotline: 410-528-8662

Education

- Bethesda Vital Living Center: 301-255-4217
- Chinese Culture & Community Service Center: 240-631-1200
- Elderhostel: 877-426-8056
- Korean Community Service Center: 240-683-6663
- Leading Age (formerly AAHSA): 202-783-2242
- Literacy Council of Montgomery County: 301-610-0030
- Montgomery College
 - Workforce Development & Continuing Education: 240-567-5188
 - Germantown Campus: 240-567-7700
 - Rockville Campus: 240-567-5000
 - Takoma Park Campus: 240-567-1300
 - Oasis: 301-469-6800
 - Mo Co Recreation Dept.: 240-255-4217

Employment

- AARP Senior Community Service Employment Program: 202-434-2020
- Able Senior Employment Center: 240-395-0918
- Montgomery County Commission for Women Counseling & Career Center: 240-777-8300
- National Older Worker Career Center: 703-558-4200
- Over 60 Counseling and Employment Service: 301-652-8072

Financial Services

- Help Unlimited, Inc.: 301-589-7438
- Representative Payee Program/Mental Health Association: 301-424-0656, ext. 111

Counseling/Support Groups

- Catholic Community Services: 301-933-3164
- Family Services Agency, Inc.: 301-840-2000
- Jewish Social Service Agency: 301-881-3700
- Korean Community Service Center: 240-683-6663
- Mental Health Association: 301-424-0656
- Senior Mental Health Services: 240-777-3990
- Therapist Line: 301-738-7176

Companions/Helpers/Visitors

- Elder Ease: 301-370-9423
- Friendly Visitor Program of the Mental Health Assoc.: 301-424-0656, ext. 107
- Senior Connection: 301-962-0820
- Telephone Assurance (Jewish Social Service Agency) 301-881-3700

Remodeling/Renovation/Modification

- Community Ministries of Rockville: 301-762-8682
- Get a Grip: 240-372-0770
- HOCOA: Home Repair Network. Maintenance company with annual fee: 240-683-4663
- Angie's List: www.angieslist.com
- Rebuilding Together: 301-933-2700
- Strategies for Independent Living: 301-585-5738
- CAPS Designated Builders & Remodelers
 - AARP: www.aarp.org/family/housing/articles/caps
 - National Association of Home Builders Remodelers Council 202-266-8200, ext. 8211

Legal Services

- Asian Pacific American Legal Resource Center: 292-393-3572
- Lawyer Referral Services: 301-279-9100
- Pro Bono Program (Montgomery County Bar Foundation, Inc.) 301-424-7651
- Accountants for Public Interest: 410-837-6533

Grocer Shopping Services

- American Red Cross of the National Capital Area, Shoppers Program: 240-485-3030
- JCA Transportation: 301-468-6280
- Senior Connection: 301-962-0820
- Top Banana Home-Delivered Groceries: 301-372-3663
- Meals on Wheels: 240-7773810

Transportation

- Beltway Metro: 301-987-9222
- Call 'N' Ride: 301-948-5409
- Casa of Maryland: 301-431-4177
- Connect-A-Ride: 301-738-3252
- Jewish Council for the Aging: 301-468-6280
- Metro Access: 301-562-5360
- Rockville Senior Services: 240-314-8810
- Senior Connection: 301-962-4044
- Medical Transportation Services:
 - Concierge Transportation: 301-774-9141
 - Jewish Social Service Agency: 301-881-3700
 - Paramed Medical Transport: 301-253-0030

Forming a Non-Profit (Tips of Creating 501(c)3, Board Training, Bylaw Development, Insurance Tips, Running Meetings, etc.)

- Maryland Association of Nonprofits: 877-565-0707, www.marylandassociationofnonprofits.org
- BoardSource: www.boardsource.org
- The Foundation Center: www.fdcenter.org
- The Nonprofit FAQ (Idealist): www.nonprofits.org
- Compasspoint Nonprofit Services: www.compasspoint.org
- Center for Nonprofit Advancement: www.nonprofitadvancement.org
- Maryland Non-Profit Website: <http://eseries.mdnonprofit.org/source/meetings>
Email: programinfo@mdnonprofit.org
- Source for software for non-profits: www.TechSoup.com

Montgomery County Village Blueprint Miscellaneous Information

Non-profit Insurance Resources

- The Non-profits Insurance Alliance Group
800-359-6422
www.ani-rrg.org
- Charity First
800-352-2761 or 888-650-2685
www.coveragefirst.com
- Insurance for My Non-profit
www.insuranceformynonprofit.org

Home Nursing Resources

Adult Day Care

- Easter Seals Adult Day Care
800-866-3771
- Holy Cross Hospital Adult Day Care
Silver Spring – 301-754-7150
Caregiver Resource Center – 301-754-7152
- Rockville Adult Day Care
301-770-7676
- Iona Adult Day Health Center
202-895-9448

Home Health Care

- Montgomery County Crisis Center
240-777-4000
TTY 240-777-4815
- Family & Nursing Care
301-588-8200 or 202-628-5300
www.familynursingcare.com
- Senior Checked – Find qualified providers
866-675-7226
www.seniorchecked.com
- At Home Care
879-2700
www.athomecareinc.com

- Respite Care Services of Montgomery County
301-816-9647

501(c)3 Information

- IRS Exempt Organization Website
EO Customer Service, 877-829-5500
www.irs.gov/eo
Form 8821 Tax Information Authorization Application
- Exemption Application Process
www.irs.gov/charities
- Exemption from Maryland Sales & Uses Taxes
www.marylandtaxes.com
- Maryland Good Standing Certificate
www.dat.state.md.us
- Solicitation of Funds in Maryland (charitable contributions, grants, etc.)
www.sos.state.md.us
Form COR-92
- Tax exempt Status for Your Organization Publication 557
www.irs.gov/publications/p557/index.html
- Record Keeping for 501(c)3: Publication 4221-PC and 4221-PI
Forms 990, 990-EZ and 990-PF
Form 990-T if gross income is over \$1,000
www.irs.gov/instructions/i990/index.html

○ Legal Resources in Maryland

Title	Program Description	Phone	Address	Intake Hours
Baltimore Bar Foundation- Legal Services to the Elderly Program	Program staff and volunteers handle pro bono, non-fee generating civil cases, involving public benefits and pensions as well as consumer, health care, housing and credit-related problems.	(410)396-5277	111 N. Calvert Street Suite 631 Baltimore MD, 21202	Monday-Friday 10:00 a.m. - 4:00 p.m.
Legal Aid Bureau- Senior Hotline	A Senior Telephone Hotline operates along with the telephone intake system from 9:00 a.m. to 4:00 p.m. (including lunch time) Monday-Friday. The hotline provides legal information and advice, brief services, community legal education, and targeted referrals to improve access and increase the number of services to older persons.	(410)951-7750 or (800)458-5340	500 E. Lexington St. Baltimore MD, 21201	9:00 a.m. to 4:00 p.m. (including lunch time) Monday-Friday.
Legal Aid Bureau, Inc.- Nursing Home Program	The Legal Aid Bureau, Inc. is a staffed legal services program offering free civil legal services to the low income population throughout Maryland. The Legal Aid Bureau has 11 offices throughout the State. The Bureau does not accept fee-generating cases. Persons eligible for services are generally served by the office serving their county of residence.	(410)296-6705 or (800)367-7563	29 W. Susquehanna Ave Suite 305 Towson MD, 21204	The intake hours are 9:00 a.m. - 5:00 p.m. Monday-Thursday.
Legal Aid Bureau, Inc.- Senior Citizens Program	Many of the local bureau offices have special programs funded by the Maryland Office on Aging to provide legal services to the elderly. Residents of the following counties are eligible: Anne Arundel, Baltimore City, Baltimore County, Calvert, Caroline, Carroll, Cecil, Charles, Harford, Howard, Kent, Montgomery, Prince George's, St. Mary's Talbot, and Washington. Contact office serving these counties. Subjects Handled: Consumer Assistance, Elder Law, Health, Hotline, Housing, Landlord/Tenant, Public Benefits, Wills, Trusts and Estates.	Central Office (410)539-5340	Central Office 500 E. Lexington Street Baltimore MD, 21202	

Legal Aid Bureau, Inc.- Assisted Living Program	The Bureau provides legal assistance to assisted living residents in Maryland related to issues such as admission contracts, assisted living regulations, resident rights, involuntary discharges and other needs. The assisted living project accepts requests for legal assistance from residents, family members, anyone helping a resident, or anyone pursuing assisted living options.	(410)296-6705 (800)367-7563	29 W. Susquehanna Ave. Suite 305 Towson MD, 21204	9:00 a.m. - 5:00 p.m. Monday - Thursday
Maryland Department of Aging	The Office offers senior citizens the opportunity to receive free or low-cost assistance with legal problems using funds from the federal Legal Assistance for the Elderly Program. These services are provided predominantly through the local sub-grantees of field offices listed below. Please call the local providers directly. If you do not see a field office program in your area, then call the central office listed above. Spanish-speaking clients are welcome.	(410)767-1100 (800)AGE-DIAL	301 West Preston St. Room 1007 Baltimore MD, 21201	Central Office - 8:00 a.m. - 5:00 p.m. Local programs may vary.
Sixty Plus Wills Program, Montgomery County Bar Association	Refers persons ages 60 and over with limited income to an attorney in their area who will prepare particular legal documents for a modest preset fee. Homebound individuals can be served in most areas. Subjects: Wills, living wills, powers of attorney, small estates and deed changes.	(301)279-9100	27 W. Jefferson Street Rockville MD, 20850	Monday - Friday 9:00 a.m. - 5:00 p.m.
Pro Bono Legal Advice Clinic Locations- MC Bar Association	The Montgomery County Bar Foundation Pro Bono Program assists low-income residents of Montgomery County, Maryland obtain free legal representation and consultation. Volunteer private practice attorneys are solicited by the Program to provide free legal guidance and/or representation in the areas of absolute divorce, custody, name changes, adoption/guardianship, landlord tenant law, bankruptcy/debt collection matters, wills and powers of attorney, and in limited	(301)565-7675	TESS Community Service Center- 8513 Piney Branch Road Silver Spring, Maryland 20901 (corner of Piney Branch & Flower Ave.)	1st and 3rd Wednesday of each month (6:00 PM to 8:30 PM)

	circumstances immigration and employment cases.			
Charles W. Gilchrist Center for Cultural Diversity (Germantown)		(240) 777-6940	12900 Middlebrook Road Germantown, MD 20874	2nd and 4th Wednesday of each month (6:00 PM to 8:30 PM)
Charles W. Gilchrist Center for Cultural Diversity (Wheaton)		(240) 777-4940	11319 Elkin Street Wheaton, MD 20901 (corner of Univ. Blvd. & Elkin St.)	(5:30 PM ~ 8:00 PM)
East County Regional Services Center		(240) 777-8400	3300 Briggs Chaney Rd. Silver Spring, MD 20904	1st & 2nd Thursday of each month (5:30 PM ~ 8:30 PM)



Family & Nursing Care is proud to partner with Montgomery County to help you build *your* Village



Our family of companies:



www.familynursingcare.com

www.legacyhomecare.org

www.familynursingcarefoundation.org